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ABSTRACT

The handbook provides guidelines for implementing the Massachusetts right to education law (Chapter 766) through the development of regional collaboratives to deliver educational services to low incidence handicapped and severely handicapped children. Chapter 1 includes instructions on the use of the handbook, reasons for considering collaboration, and explanations of the legal options, legal basis, and characteristics of collaboration. Considered in Chapter 2 are the advantages offered by collaboratives relating to administrative services and student programs, and considerations for joining a collaborative including assessing local situations and evaluating existing organizations. Chapter 3 contains a description of the four phases of planning and development: identifying where to begin, determining the collaborative's structure, developing program design, and developing a financial plan. Included in Chapter 4 are a five-part plan for needs assessment in the areas of number of students needing services, current service resources, transportation, funding resources, and general collaborative interest; and worksheets for program planning and evaluation. Provided in the appendixes are texts of Massachusetts laws and regulations pertinent to collaboration, case studies of seven collaboratives, and the titles, service areas, and names and addresses of contacts for 70 collaboratively run programs in Massachusetts, listed alphabetically by region. (IM)

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APPROACHES TO COLLABORATION

a handbook of strategies for serving special needs children

A project conducted by the Education Collaborative for Greater Boston
and supported by the Massachusetts Advisory Council on Education,
The Metropolitan Planning Project and
The Massachusetts Department of Education, Division of Special Education

APRIL, 1975

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foreword

Concerns which cluster around equal educational opportunity have guided the Advisory Council in several studies, with this handbook being the most recent. Shorting children with special needs is one manifestation of inequity. Two previous MACE reports have focused directly on the child with special needs and the quality of their schooling. One led to the landmark legislation now variously called "Chapter 766," or the "Bartley-Daly Bill," passed by the General Court in 1972. Chapter 766 legislation has been described around the nation as "the most progressive public school special education program in the country."

Progressive or not, Chapter 766 was badly needed even though it has led many already overburdened school administrators to wonder if they could cope with the comprehensive and ambitious features of the bill. In recommending the legislation, MACE was clear in its intent to advocate improved special services for the handicapped child and to center the services on education. MACE and Chapter 766 notwithstanding, the ultimate test is what happens to the child with special needs.

By all measures, one of the most promising ways emerging to advance equal educational opportunity is through collaborative arrangements meant to respond to and provide for programs and services of a quality not otherwise available. This handbook, developed by EdCo, is designed to support the principles of Chapter 766 at a practical level by helping to assure that collaboration is placed on a sound basis.

Acts of collaboration have an exciting potential for assuring educational opportunity and for making certain that scarce resources are used effectively. This handbook forwards that general objective while being specifically directed to developing collaboratives for children with severe handicaps.

Well over one hundred good and talented people contributed to this handbook. It contains practical wisdom distilled from many and varied sources. Study it. Use it. Let us know the results. We must move on education challenges together. That's what collaboration is all about.

Ronald Jackson
Associate Director of Research
Massachusetts Advisory Council on Education

study directors' preface

In an effort to address a statewide need for the delivery of services to severely handicapped students, the Massachusetts Advisory Council on Education commissioned the Education Collaborative for Greater Boston to pursue a study on viable approaches.

The study, entitled "Collaborative Implications of Chapter 766 in Programming for Low-Incidence Handicapped Individuals," began in January 1974 with the conviction that collaborative programming was the most effective means for delivering services to severely handicapped youngsters. This set the direction for the research and the findings that resulted in this handbook.

We began by researching existing collaboratives and regional programs both locally and nationwide. However, it was our interaction with collaboratives in Massachusetts, conducted through interviews, visits and meetings, that provided us with information on successful models of collaborative governance, management, delivery of services and fiscal relationships. This information created the foundation of the guidelines in this handbook, which are intended to encourage communities across the state to perceive collaboration as a means of implementing Chapter 766.

The study was conducted at a most appropriate time with the enactment of Chapter 766. School systems across the state were seeking a means of providing services to their handicapped youngsters and it was discovered that almost all were involved with other districts in some manner. For the first time schools were being asked to provide a service that had historically been provided by other institutions or not provided at all. Additionally, school systems were seeking technical assistance and guidance on ways to work together . . . to share resources . . . to save money . . . to collaborate.

Under this aura of need, information and communication were the two important areas our project study team addressed. Collaboratives and neighboring school districts were invited to meet with us to explore ways of collaborating. A network of information and communication channels developed, aided by the statewide dissemination of four project newsletters. Relationships were established statewide that provided invaluable sources of input and direction. An outgrowth of these relationships is the opportunity for continuous interaction and collaboration to find approaches and solutions to common problems. As a result of this study, individuals representing a variety of agencies and school systems across the state are currently meeting to design and implement collaborative programs that serve the needs of their low-incidence populations. Thus, the climate was opportune for the pursuit of this study.

Our work over the past few months has also led us to examine and critically analyze the mechanism, "collaboration." We have repeatedly broken down and rebuilt our definitions on the basis of the insights we have gained.

This document will prove successful if it assists school districts in establishing unique and effective approaches to delivering services to the special needs students of our Commonwealth.

Medill Bair
Marilyn Bisbicos
The Educational Collaborative for Greater Boston

acknowledgements

This manual has come into being through the efforts of innumerable people, especially the individuals and representatives of state agencies and collaboratives across the state who were most gracious in giving of their time and assistance. We started to prepare to acknowledge all the people who have assisted in the study and determined it was impossible to list all who should be recognized both because of its length as well as the fear of omission.

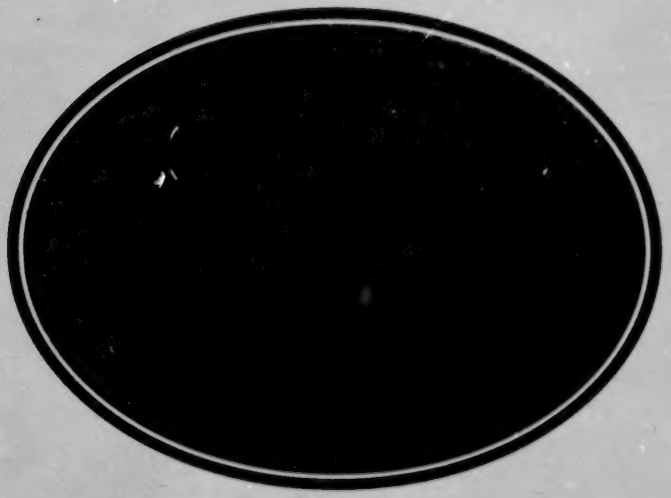
Although key committees have been identified elsewhere, we do want to note the contributions of the Study Advisory Council at critical times.

The advice and assistance of Ronald Jackson, of the Advisory Council on Education, should be cited, especially his continuing support and effective counsel. His personal suggestions and concerns for quality and meaningful results were incorporated into staff procedures and efforts.

A substantial contribution to the writing and researching of sections of this manual was made by Robert Kurtz, Director, Human Services for the North Shore, Inc. Under a federal grant (PL 91-517), Mr. Kurtz became a valuable resource to collaborative directors by providing technical assistance as they formed their organizations. Working cooperatively with project staff, Mr. Kurtz shared many issues and findings which are included in this manual.

We also extend special thanks to the following individuals for their continued assistance to the study team: Peter Demers, Hampshire Education Collaborative; Dr. Robert Hartman, READS, Inc.; Gerald Mazor, CASE Collaborative; Thomas McMurray, Blackstone Valley Collaborative; Peter Murphy, Massachusetts Department of Education; and Kevin O'Grady, North Shore Consortium.

Finally, we wish to thank Toby Levine of Levine Research Associates for her patience and perseverance in contributing to the completion of this manual.



CHAPTER 1: WHAT COLLABORATION MEANS TODAY

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informal collaboration
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introduction

This is a book *about* children . . . severely handicapped children with very special educational needs. Whether your school district is large or small, such students comprise between two and ten percent of your total enrollment, and they range in age from 3-21. Under the requirements of Chapter 766, these children must receive an equal and quality education, but often cannot benefit from a so-called regular classroom. Many have never before been publicly educated. Each of these children requires an individualized educational plan based on a thorough professional evaluation.

But it is a book *for* adults, specifically those adults who make decisions regarding the education of special needs children. Included in this audience are superintendents, school committee members, directors of special education and pupil personnel services, evaluation coordinators, and directors of collaborative programs.

The singular and unifying focus of this book is collaboration – how school administrators can work together to design and implement quality educational programs for severely handicapped students in a cost-effective way. It is called a handbook because it is designed to help you decide:

- *whether collaboration is an option to consider*
- *whether joining a collaborative or starting one is appropriate*
- *how to activate a collaborative plan*
- *how to maintain your collaborative organization*
- *how to decide if collaboration should continue*

As a handbook, it includes information on: pertinent statutes; specific criteria to make judgements about collaborating; a step-by-step process to initiate a collaborative; a method of assessing needs both within a district and across districts; planning and evaluation instruments; examples of collaborative services; funding sources; agencies offering support services; case studies of existing collaboratives; and a regional listing of collaboratives that identifies their major services. These features have been planned to provide you with both the information and support that will enable you to improve your special education program services.

how to use the handbook

If, in your judgement, collaboration might be an attractive method through which to serve some or all of your special needs students, three options become apparent:

- *join one*
- *start one*
- *improve existing arrangements*

The objective of this handbook is to provide you with enough information to choose and implement a course of action in a responsible way.

Chapter 2 discusses the range of programs and services that are currently offered by collaboratives across the state. It also presents a decision-making process that will help determine whether to join an existing organization or initiate the formation of a new one.

Chapter 3 is specifically directed to educators who are about to start or join a collaborative, or to collaboratives in an early stage of development. It outlines a decision-making process that will provide the foundation of a sound management structure and includes such vital issues as needs assessment, goal definition, governance structures, policy formation, legal restrictions, budgeting, financing, and obtaining state approval.

Chapter 4 contains planning information for those communities wishing to develop or continue collaborative arrangements. To assist in the development of an appropriate data

collecting design, sample needs assessment instruments have been included. Instruments for use in evaluation are also provided for the assessment and improvement of on-going collaborative endeavors. These sample working papers have been presented together for convenient reproduction in order to modify them for use.

If the manual accomplishes its objective of self-help, the risk of forming a collaborative should be substantially reduced, and the probability that an established collaborative can achieve self-sustaining operations should be increased.

why consider collaboration?

It is no secret that school enrollments are shrinking, that costs are rising, and that the two factors are related. In general, it is becoming increasingly difficult to maintain quality educational programs with tightened budgets. Yet to consider asking the public for additional money is to invite additional censure from a public that has at times loudly proclaimed its reluctance to support either increased taxes or school bond issues.

In the last year, this dilemma has been compounded by the required implementation of Chapter 766 of the Acts of 1972, known originally by the names of its sponsors – Daly-Bartley – and more recently, simply as "the special education law." No single law on record has so completely transformed the responsibilities of special education or added so substantially and so suddenly to its cost.

Why is it so costly? Chapter 766 requires each school district to review its entire range of special education services and introduces to the public school population many students who previously were served by other public and private agencies. If these same children could simply fill the empty seats in schools with declining enrollments, their impact would be slight; in fact, in some districts, their enrollment might have cost benefits. But the majority of these children cannot receive educational benefits in this way. They must be evaluated and have special educational plans developed for them. Many of these plans will require the introduction of new facilities and new programs, as well as new and more specialized staff and administrative procedures.

There may be only a few children in your entire district who have a particular handicap. But even these few might not be appropriately grouped in one class because they are likely to be far apart in age and ability, even within the limitations of their handicap. Historically, the term low-incidence has been applied to severe handicaps, meaning that deafness, for example, is found in two percent of a population. But this statistic is relative in its actual impact, for two percent of a student enrollment of 100,000 is 2,000 students. With this large a handicapped population, cost-effective groupings are likely to be found, and programs probably exist. In smaller school districts, the problems of educating such students become magnified, and it becomes an economic impossibility for each district to provide effective services for the entire range of handicaps. This is a very compelling reason to consider collaboration.

chapter 766 options

Let us look at the problem from a different perspective. A severely handicapped student has been identified and a core evaluation has been performed. It recommends an educational plan that cannot be filled through currently existing programs in your district. What options are available to you? Section 201.1 of Chapter 766 regulations (see Appendix A) outlines the available courses of action for delivering service:

Each school committee shall have the following options in satisfying any of the requirements of these regulations.

(a) It may satisfy such requirements itself.

(b) It may enter into an agreement to satisfy such requirements through a regional collaborative.

(c) It may enter into an agreement or contract with a private school or public or private agency or institution to satisfy such requirements.

Each option must be evaluated for educational effectiveness, cost effectiveness and availability. If no program can be identified that meets your criteria, then collaboration may be the best of the three alternatives, and you may well find many of your neighboring colleagues at the same place in their considerations.

It must be stressed, however, that collaboration is not a panacea. In some cases, it makes sense for a school district to initiate and carry out its own program. In others, some degree of collaboration may be advantageous, but joining or forming a collaborative will not be. In yet other cases, the benefits of membership in a collaborative will far outweigh its cost, and may provide the only cost-effective means of implementing the provisions of the law.

This first chapter is intended to define the concept of collaboration and to assist you in answering the question: Should you consider collaboration?

legal basis of collaboration

Between 1970 and today, the General Court of Massachusetts has enacted several pieces of legislation that allow for collaborative solutions to educational problems. The laws currently in force – Section 4A of Chapter 40 of the Acts of 1970, and Chapter 797, an amendment to Chapter 40 that went into effect in November 1974 – are included in Appendix A.

Chapter 40 is of importance because it is the original enabling legislation that permits two or more school committees to authorize agreements for educational activities to be jointly undertaken. It is under this legislation that the majority of current collaborative relationships were initiated.

In 1972, Chapter 753, an amendment to Chapter 40, was passed. This legislation allowed for the establishment of collaborative organizations – a more formal type of collaborative relationship.

When this research project was begun, these two laws were the legal benchmarks to collaborative activity. During the researching of this book, a new law – Chapter 797 – was passed. As of November 1974, Chapter 797 amended Chapter 753. The new law is of importance for two of its provisions. First, it prescribes in detail some aspects of collaborative governance systems that previously were left to members to decide; second, it creates the possibility whereby the state can potentially fund part of the start-up costs for some newly developing collaboratives. This law assumed particular importance to special educators who at the time of its enactment were just beginning to feel the full brunt of implementing Chapter 766.

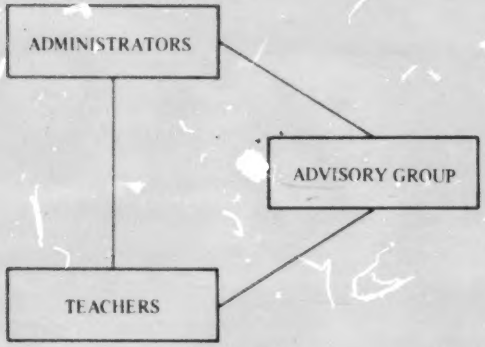
The beginning of this research, then, focussed on Chapter 753 and sought to define methods of organizing collaboratives under its limitations. Many groups in the state had been organized under this law and there existed a body of experience through which the study team could examine the strengths and weaknesses of alternative approaches. The passage of Chapter 797 caused the study team to redefine its mission. The experiences of Chapter 753 collaboratives were still studied, but, because the new law defines a somewhat different organizational structure than had been previously used, it was unknown if existing collaboratives would be "grandfathered" – considered to have a continuing legal status. Attention was then directed toward assisting the State Department of Education in their definition of the guidelines for implementing Chapter 797.

what are the characteristics of collaborative relationships?

informal collaboration

- *obtaining outside funding*
- *lack of formal recognition*
- *lack of guidelines for program control*

SAMPLE ORGANIZATIONAL CHART FOR INFORMAL COLLABORATIVES



formal collaboratives

Formal collaboratives may be single purpose or multi-purpose. A single purpose organization, such as a special education collaborative, may involve a number of programs, e.g., transportation, teacher recruitment, a program for hearing-impaired students, etc. Many of the formal collaboratives currently operating are structured according to Chapter 753 guidelines and must have a Board of Directors, thereby providing a structure through which general policy questions can be determined. A second level of management may be organized as an advisory council. Special education directors, representing their districts, would meet more frequently to supervise program operations. Whether or not the collaborative has its own staff (or relies on LEA staff) usually depends on the type of program offered and on the level of funding.

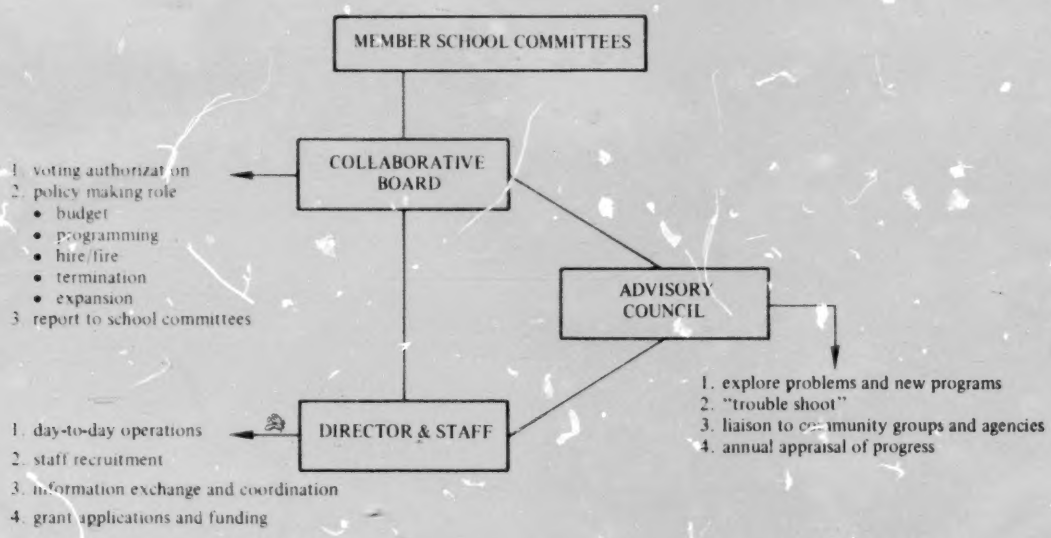
Many such collaboratives begin informally and later seek state approval. This trend could change, however, under the provisions of Chapter 797, which requires formal state approval for funding eligibility.

There are problems inherent in formal collaboratives as well, often similar to those found in informal arrangements. Where a collaborative offers only a single service, there is a common concern that if one member no longer needed the program or service offered, the entire collaborative might be jeopardized, particularly if the resigning member was the one who had previously contributed the largest share of funding. A second area of concern relates to employee benefits and tenure arrangements. These problems are addressed in Chapter 3.

multi-purpose collaboratives

Multi-purpose collaboratives tend to have somewhat more stability. Such organizations usually have a central staff that allows the collaborative to be more responsive to a wider range of individual members' needs on both short and long-term bases. Their management problems, however, tend to be similar to those of the single purpose collaborative, e.g., finding financial support for members' requests, providing tenure and benefits to collaborative employees and developing a sound organizational structure.

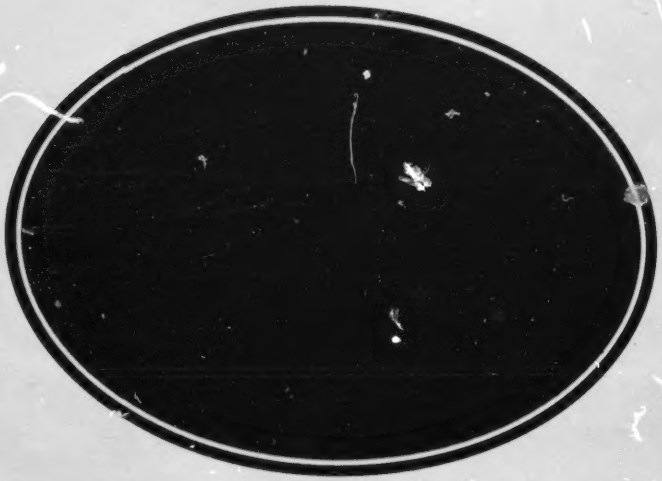
SAMPLE ORGANIZATIONAL CHART FOR FORMAL COLLABORATIVES



regional and statewide collaboratives

The most recent development in collaborative structures are linkages between existing collaborative organizations. Such a step has been taken in the Greater Boston Region, through the development of the Joint Planning Group, representing the collaboratives in the region.

A statewide planning group of collaboratives is also in the formation stages under the guidance of the Division of Special Education and the Regional Education Centers. This will provide an important linkage arrangement among collaboratives for seeking solutions to common problems generated by Chapter 766 and for disseminating information related to exemplary programs.



CHAPTER 2: JOINING A COLLABORATIVE

introduction

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what do collaboratives offer?

administrative services

student programs

•

which collaborative should you consider joining?

assessing local situation

evaluating existing organizations

introduction

There are a number of valid reasons why a community would consider joining a collaborative. Perhaps as a result of core evaluations, you have identified a gap between the services your district offers and those you need. On the other hand, maybe you have been approached by an existing collaborative or one in the process of forming. Still another reason might be that agreements you have had in the past are not working well in the present. Whatever the reason, you must first consider the range of services that might be offered through collaborative membership, and second you will need to evaluate specific existing groups to see if any meet your needs.

what do collaboratives offer?

In this section we define a broad range of programs and services that are currently offered by existing collaboratives and refer to specific organizations or agreements as illustration. The illustrations used are followed by bracketed numbers which refer to their positions in Appendix C, a listing of collaboratively run special education programs in the Commonwealth, their members, services and administrative contacts. The listing is organized by geographic region according to the boundaries of the Department of Education. The citations used in this chapter are merely representative examples and are not complete references, either in terms of all the services available through a particular agreement or all the organizations that offer a particular program. For a more complete listing, we refer you to Appendix C.

There is no single collaborative that includes every service or program described in this chapter. Our purpose is to point out that many special education administrative and educational services are successfully being implemented currently through collaborative arrangements, and to assist you in selecting a collaborative approach most appropriate to your needs.

As you read through the program descriptions that follow, consider how your school district currently accomplishes the various tasks that are described. In many cases you will find that your current procedures are efficient and effective. Others may suddenly strike you as areas where problems have arisen time and again. In assessing your needs, these are the areas that will probably prove most likely to be successfully solved through collaboration.

administrative services

The requirements of Chapter 766 have increased local administrative burdens. Participating members have frequently found that these responsibilities, normally assumed by a school district's special education staff, can be more efficiently accomplished by a collaborative. Because of its unique position, the collaborative staff can effect the consolidation of service across districts.

Personnel

Chapter 766 has required a significant increase in school personnel with special education training, experience and certification. Traditionally, each school district has conducted its own recruitment campaign through newspaper advertisements, notification of college and university placement services, word of mouth, and occasionally through private placement services. In many cases, qualified personnel either never learned of openings, or, having established a geographical boundary in which they would like to work, spent countless hours going through identical processes in community after community. Further, each school district was deluged with applications for every available position, as were all its neighbors.

Several collaboratives have begun model programs for teacher recruitment and selec-

tion. CAPTA (Collaborative Approach to the Processing of Teacher Applications) [46], a single purpose collaborative of 16 communities on the South Shore, was initiated from a mutually felt need to reduce paperwork and to eliminate unnecessary repetition among applicants in neighboring districts through the use of computer technology. Applicants use one application form for all communities, noting their priorities on the form. It is interesting that when CAPTA was getting under way, a major issue was the feeling of each member that its own application was unique. A study of these applications showed that although the order and precise wording of items differed from community to community, the basic information requested in each case was virtually the same. On this basis, a common application was developed.

A similar, but less formal procedure is used by SPEDCON, North Shore Special Education Consortium [29], which maintains a personnel bank for its ten members and keeps lists of vacancies and data on all prospective candidates on file. SPEDCON serves its members by advertising all vacancies, and accepting and analyzing all applications. It then sends appropriate applicants to the individual member LEA's for interview and final selection.

Collaboratives active in this role find that the process considerably reduces the volume of paperwork for their members, while allowing each member to choose from the widest selection of qualified applicants. Further, it establishes a permanent resource file of personnel with special qualifications.

In-service Training

A related service, and one frequently offered by collaboratives, is in-service training. This usually involves bringing together professionals and/or non-professionals from several communities for shared training experiences. Collaboratives with in-house research and development staffs may prepare a training program based on the specific needs of members, or may purchase the services of trainers, taking care of all administrative coordination. This service is particularly important in implementing Chapter 766 because the law redefines many traditional roles. Classroom teachers, for example, are now working with a much more heterogeneous student population and, as a consequence, find that individualizing the curriculum and teaching through a diagnostic/prescriptive approach is no longer just one possible approach, but more likely is now mandatory. Most classroom teachers are untrained in this approach as well as in the sociological and psychological support that may be necessary in a classroom that includes special needs children. But it is not only classroom teachers who may require in-service training. Parents, administrators, cafeteria workers, bus drivers – the entire school community is affected by Chapter 766.

Several collaboratives have attacked this problem. For example, communities in the western part of the state have entered into an agreement with North Adams State College[66] for specific types of teacher training courses. Although this is not a formal collaborative, it constitutes collaboration among school districts to collectively purchase a service.

Certain formal collaboratives have standard training courses given at scheduled intervals. For example, the Merrimac Education Center (MEC) [25] and the Education Collaborative for Greater Boston (EdCo) [9] each offer a Principal's Training Program aimed at preparing school administrators to assist in serving children with special needs. The Education Cooperative (TEC) [13] also offers a variety of in-service courses in media utilization and individualized teaching techniques.

The most recent innovation in this area is the development of the Joint Planning Group, a collaborative of collaboratives, initiated by the special education staff of the Greater Boston Regional Education Center. One purpose of the Joint Planning Group is to develop in-service training programs to implement Chapter 766 and to share training experiences and expertise among the seven collaboratives in the region, thus affecting the 36 communities in this area. The Joint Planning Group is currently preparing training packets (to be available in the spring) on instructional materials, utilization of media, and pre-school programs.

Information Exchange and Proposal Development

One of the most valuable services rendered by collaboratives to their members is the exchange of information and the opportunity to discuss mutual problems. Because special educators have traditionally been somewhat isolated within school systems, opportunities for information sharing within and among school systems has been very positively received. In general, collaboration allows peer professionals from different communities to problem solve together on administrative, legal and political problems. Being part of a collaborative allows special educators, teachers and administrators to examine program priorities, to identify appropriate funding agencies, and to produce proposals for new programming in a cooperative manner.

Each year, for example, LEA's are notified by both federal and state agencies of the availability of funds under different legislative programs. Competition is usually quite high. In many instances, contiguous communities may be filing essentially the same proposal. Often, if two or more communities were involved in the effort, the developmental costs could be spread over a broader base and the cost-effectiveness of the program would be increased. Further, one of the traditional thorns of program funding is the lack of dissemination of program results. Clearly, joint proposal and program development speaks to both of these issues.

In several cases, collaborative members have made formal agreements to cooperate on efforts to secure funding. The state has looked favorably on this cooperation because it encourages the maximum usage of minimum dollars. Collaborative proposal development has also allowed communities with very small populations to apply for and receive funding for which they otherwise would not have been eligible.

Some collaboratives have found it effective to hire special personnel with unique qualifications in proposal development to assist them with this activity. Because of the broader base of funding, such consultants have been able to be employed in the most efficient manner.

Should member communities decide not to apply for funding collectively, a collaborative can still serve as a clearing house to advise members when they are submitting competing or overlapping proposals. In some cases, members are asked to file an abstract of their proposals with the collaborative, which then distributes the abstracts and gives members a period of time in which to respond. If no one opposes the proposal, the collaborative publicly endorses the effort and pledges their support and cooperation to the venture. This, too, is generally looked upon favorably by government proposal evaluators for it ensures some dissemination of research findings.

Needs Assessment

All collaboratives must at some point identify, assess, and assign priorities to the needs of their member communities. In some cases, this has been accomplished prior to starting the collaborative by the individual LEA staffs as a means of deciding whether they wish

to join a collaborative; in others, it is undertaken as the collaborative's first task. The subject of needs assessment is described in detail in the following chapter, and information in Chapter 4 will also be of assistance in this planning activity. We note it here, however, to point out that a collaborative is often better able to collect and analyze needs assessment data because it enjoys an objective perspective. Also, when the collaborative has on file the current programs and status of each of its members, it is in a position to rapidly assist members who have similar needs.

Legislative Impact

Because many voices are stronger than one voice, collaboratives have often been used as vehicles for recommending new or revised legislation. Project SEEM [27], for example, was instrumental in the drafting and passage of Chapter 753, the original legislation that gave legal status to collaboratives and allowed collaboratives to act as their own fiscal agents. In another case, EdCo [9] petitioned the Department of Education in the spring of 1974 for greater community input into the drafting of guidelines and regulations for Chapter 766. As a result, twelve people from EdCo school districts were assigned to the Task Force Committee that formalized the final guidelines and regulations for statewide use. Most recently, following an EdCo sponsored meeting at which mutual concerns were expressed, collaborative directors from all over the state joined an Ad Hoc Advisory Committee to assist the Bureau of School District Reorganization and Collaboration in drafting guidelines for the implementation of Chapter 797.

Transportation

Because of the scarcity of low-incidence educational programs throughout the state, educating students with special problems has often meant transporting them considerable distances under very special and costly door-to-door arrangements. In an attempt to provide cost savings and efficiency to this process, several collaboratives, including Lighthouse Educational Corporation [51], SPEDCON [29], TEC [13], CASE [18] and SEEM [27], have carefully analyzed the transportation needs and services of member communities. Through their efforts, a considerable degree of duplication and unnecessary travel has been eliminated. Students in neighboring communities traveling to the same educational site have more logically been assigned to one carrier. In some cases, the collaborative organizes and coordinates the transportation of all special needs students within member districts. In other cases, the collaborative analyzes the transportation needs and makes recommendations about grouping, use of vehicles, cross-community pick-ups etc., which individual LEA's then implement.

Transportation issues are worthy of consideration by collaboratives for financial reasons alone. Present isolated practices may be excessively expensive. Experience substantiates that collaboratively-run transportation systems, designed in response to Chapter 766, have been successful in reducing costs. For a more detailed consideration of these issues, a publication entitled *Cost Analysis for Regional Transportation System* (1974) is available from MACE.

Student Exchanges and Related Services

In many cases, the collaborative serves as coordinator to effect student exchanges between communities. Project SEEM [27], TEC [13], CASE [18], and the Blackstone Valley Collaborative [32] arrange inter-district transfers through which services not available in one community are provided in another. Frequently, this type of cooperation also includes joint purchase agreements for equipment and space. The Hampshire Collabo-

rative [62] has a mobile van for use within member communities. A Fitchburg area group coordinates the purchase of specialized equipment and instructional materials; member districts share the costs. In other arrangements, the collaborative administers the shared facility. CHARMSS [6], for example, rents community buildings in which they operate special service programs for their member districts. LAB [10] has purchased a facility that serves as a community residence and workshop for older adolescents from its three towns. And this spring, EdCo [9] will sponsor a community residence facility for younger, school-aged children as they become deinstitutionalized.

student programs

It may at times appear that Chapter 766 does not have to do with students at all; that it seems to create an administrative and bureaucratic overload that never gets down to having an impact on children. And, although we have cited a great many administrative reasons for collaboration, we have not yet spoken to the issue of education. The special educational programs best provided by collaboratives are those that serve children with severe handicaps, for it is these programs that are most expensive to develop and maintain on a per pupil basis. Because these students require special programming, school districts have experienced considerable difficulty in providing comprehensive, quality programs. Programs for these students are currently being offered by more than 40 collaboratives across the state and range from the sharing of itinerant teachers to classrooms operated entirely by the collaborative.

A newer special needs population, pre-school children, ages 3-5, are also being served through collaborative programs. Brookline-Newton [11] and the Pilgrim Area Collaborative [52] are examples of pioneers in this area.

Another frequently offered collaborative program is vocational education for the handicapped. CHARMSS [6] has recently introduced a sheltered workshop program for moderately handicapped adolescents over the age of 16, and SPEDCON [29] offers both workshop and work-study programs. A resource which may prove useful in this area is *Collaborative Programs for Occupational Competence*, Publication No. 7072, 1974, available from the Massachusetts Department of Education.

Evaluation

One of the greatest needs of LEA's under Chapter 766 is for thorough evaluations of those children referred. For the most part, diagnosis and evaluation will be performed by a core evaluation team which will then prepare an educational prescription based on the outcome of the evaluation.

However, there are many districts where the expertise available in the district must be supplemented by more specialized personnel. This will be particularly true in evaluating students who are currently institutionalized. A collaborative has the option of forming a Core Evaluation Team to serve its members or developing a team from among the capabilities of member districts. SPEDCON [29] and Franklin County Supplementary Education Center [61] assist member communities by making arrangements with local hospitals and medical facilities for special diagnostic services. Regional Educational Assessment and Diagnostic Services (READS) [54] will also assist in performing a secondary evaluation, when requested, to serve its members of the South Shore.

which collaboratives should you consider joining?

Whether you have a particular problem, or just a general interest in collaboration, you must first be able to identify what services and programs you require and what your district's particular strengths and available resources are. It is suggested that the following

assessing local situation

sample chart be used to make a broad assessment of priority needs and of those benefits you can offer. We stress the latter as well as the former because collaboration differs markedly from purchasing a private service, in that it builds on the strengths of the membership.

Program/Service	Need (Specify Level)	Can Offer (Specify Level)
Autistic		
Developmentally Disabled		
Diagnostic		
Emotionally Disturbed		
Hearing Impaired		
Language Impaired		
Visually Impaired		
Staff Recruitment		
Staff Training		
Transportation		
Administration		

evaluating existing organizations

Having identified those items of importance to your district, you are now able to proceed in one of two directions. If you are currently a member of a collaborative, the evaluation guide in Chapter 4 will help you determine if continued participation is desirable and if there are changes in programs, services or policies that might be recommended to enhance the effectiveness of the organization. If it appears reasonable to consider joining an existing organization, you should review the listing of collaboratives in Appendix C to determine a set of likely possibilities. You should also check your Regional Office for the latest information on collaboratives in your area. The following list of questions can then be applied to refine your initial assessment.

matching your needs to a collaborative

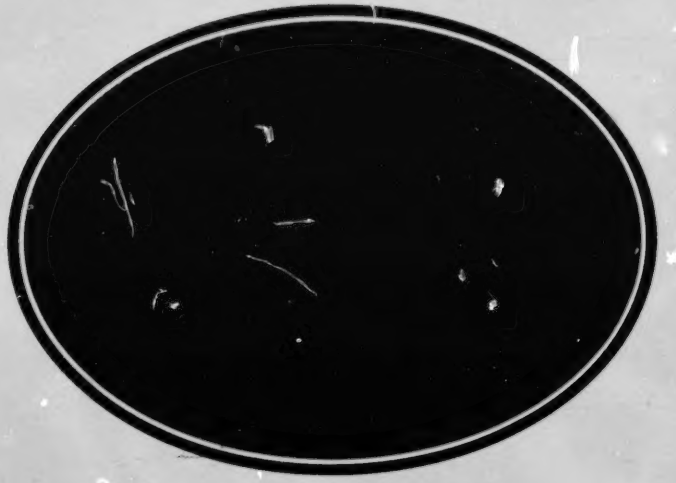
1. Is it located in a reasonable proximity to your district?_____
2. What are its objectives?_____
3. What programs are currently offered?_____
   And to what population?_____
   a. In your district?_____
   b. Elsewhere?_____
   c. What are the costs of transportation to the place of service delivery?_____
4. What support and administrative services are offered (e.g., bookkeeping, CETs)?
   _____
5. What additional programs are planned?_____
   When will they become available?_____
6. Who are the current members?_____

7. What are the requirements of membership? _____
   a. Financial _____
   b. Services-in-kind _____
   c. Must you pay a flat rate if you don't need or use all the services? _____
   d. If you join, can your students be served right away? _____
8. How long has the collaborative been in existence? _____
9. How is the collaborative funded and how stable is this arrangement? _____
   How are funds managed? _____
10. How is the organization governed? _____
11. How is it staffed? _____
    a. Full-time____ b. Part-time____ c. Consultants____ c. In-kind _____
12. Is the management and organization of the collaborative consistent with the operating style of your district? _____

From having completed steps 1 and 2, you may be able to identify an organization that meets your needs and effectively complements the services your district currently offers. If so, the decision has been made.

On the other hand, such a collaborative may not have been found. Remember that collaboration is still a relatively new concept and there is much fertile ground left to be explored and many groupings of districts yet to be tried. If no existing relationship meets your needs, but your needs are clearly identified, you are in a position to seek out other districts whose strengths and weaknesses are complementary to your own.

The following chapter will assist you in the process of creating a new collaborative.



CHAPTER 3: ORGANIZING A COLLABORATIVE

introduction

PHASE 1: GETTING OFF THE GROUND
assuming responsibility for leadership
preliminary meetings

PHASE 2: DETERMINING THE COLLABORATIVE'S STRUCTURE
determining governance structure
costs to member communities
determining bylaws
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PHASE 3: DEVELOPING PROGRAM DESIGN
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PHASE 4: DEVELOPING A FINANCIAL PLAN
leading a collaborative
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introduction

All too often collaborative arrangements are launched in midstream and without the detailed planning that results in a sound organization. The planning model presented in this chapter can be used to start a new collaborative as well as to reorganize an existing one. It will also be useful to collaboratives that want to expand their services or to those that seek a more structured framework. For the sake of clarity, the model is described through four phases:

1. Getting Off The Ground
2. Determining The Collaborative's Structure
3. Developing Program Design
4. Developing A Financial Plan

Each phase has certain activities associated with it that are described under the appropriate headings. The steps essential to the formation of a collaborative are identified within these activities. This process may be expanded, deleted, modified, conducted simultaneously or in a different sequence. The model is meant only as a guide to provide a starting point for collaboration and to help developing and existing groups to establish a sound structure that will give the organization the stability to be responsive to its members' needs over time. Additional planning assistance for established organizations will be found in Chapter 4.

PHASE 1: GETTING OFF THE GROUND

assuming responsibility for leadership

The person most likely to have responsibility for analyzing collaborative options is the pupil personnel or special education director acting on the authority of the superintendent. Several factors might initiate the study:

- *the lack of a specific program*
- *the recognition of a common problem among contiguous communities*
- *a need for a special education program that is too expensive to launch singlehandedly*
- *the realization that an existing program has declining enrollment*
- *the desire for cost savings*
- *parental or teacher requests*
- *the identification of potential funding*

STEP 1: problem identified

STEP 2: authority

Clearly, a combination of these factors might exist. It should be stressed that assuming leadership at the outset does not necessarily mean that you will bear the brunt of it forever, but it does mean that time will be needed for coordination and planning, and that the responsibility must be undertaken with the full approval of the superintendent. If the responsibility is to be continued through the entire developmental stage, there must be recognition of the implications on staff time. It is suggested also that the advice and support of teachers and parents be considered at this early stage in development.

STEP 3: identifying potential members

The hardest step is often identifying where to begin. One approach might be to study a map of your local area and draw a circle equal to a 40-mile radius, listing all the communities that fall within it. Or, you might begin with the communities that belong to an already defined region of which you are a part, e.g., boundaries defined by the Department of Education Regional Offices. In considering candidate communities, remember that not every one will want to collaborate; likewise, not every one will be equally desirable from the potential organization's point of view.

The following factors will help to identify potential members for the developing collaborative community:

1. **Geographic Spread**

A rule of thumb is to consider a group of towns that do not require more than 40 minutes travelling time from one boundary to the other.

2. **Compatibility**

This factor relates to size and current program offerings as well as to attitudinal factors. While it may appear that districts of similar size and common problems may best be able to collaborate, it must be pointed out that dissimilar districts can also be compatible partners in a collaborative venture. Dissimilarity may in fact provide the very basis for successful collaboration.

STEP 4: preparation for initial meeting

The attitudinal factor in compatibility relates to knowing who among your colleagues is likely to be interested in collaboration, and which districts usually prefer to "go it alone." It would be unwise, however, to eliminate too many communities on casual bases, since their current fiscal and service delivery problems may override previous autonomous inclinations.

Having identified communities that appear to be candidates for a collaborative venture, the primary needs and existing resources of each community should be charted so that comparisons can be made. This broad-based information can be obtained over the phone. Note that this is not a full needs assessment, but a technique that highlights similarities and differences among previously unassociated communities and has proven to be an effective means of introducing them to each other. This is also the first step in developing an appropriate needs assessment instrument.

The result of this effort outlines the gaps and/or overlaps in service delivery and identifies common problems. Conclusions could suggest areas of possible collaboration, including services that might be useful to all participants and some that appear to be needed by a subset of participants. Candidate communities should be informed of the findings and invited to an exploratory or orientation meeting. The key people in each community charged with the responsibility for children with special needs should receive invitations. Invitations might also be extended to the Regional Education Center and to individuals who are currently operating collaboratives in the area.

preliminary meetings

More than one meeting will probably be required to reach a working consensus. Further, a representative of each community should expect to spend some time outside of meetings laying the groundwork for collaboration and assessing the priorities of his or her own district. It is important to stress in this early relationship that no single plan exists and yet that there are many possibilities. Furthermore, the initial group may break up into a series of smaller groups, each pursuing its own course. Somewhere in the series of meetings, some communities will drop out of the process, others may join, and the result will be a group of districts that considers itself a collaborative, at least in intent.

STEP 5: initial meeting

At the first meeting, the chairperson should clearly present the advantages of participation as well as examples of how collaboratives have worked elsewhere. Representatives should also develop a time schedule and decision-making plan. Initially, the major areas of discussion will relate to:

- *a statement of goals*
- *defining program needs and priorities*
- *needs assessment instrument*

A Statement of Goals

From the initial presentation of similarities and dissimilarities among communities, the group should be able to determine the basic intent of the relationship. If, for example, early analysis shows that all possible needs are met somewhere in the member communities, the basic intent of collaboration may be to coordinate programs across district lines. If a specific program is needed by many districts, yet exists nowhere, the collaborative might be formed to develop and provide that service, e.g., a residence program or a pre-school class for developmentally disabled students.

A recommendation should be made by the district representatives whether the organization is to be:

- *multi-purpose or single purpose*
- *administrative or service delivery*
- *single program or multi-program*

How the general goal is stated will have direct bearing on the type of organization developed. It is necessary to point out that if the group decides to apply for state approval under Chapter 797, and the general goals of the program later change, they would need to reapply. Thus, there appears to be some justification for stating the goals somewhat broadly.

Defining Program Needs and Priorities

Earlier we discussed a type of general information gathering that would be appropriate to present at an orientation meeting. Although the quantity and quality of information likely to be amassed is sufficient for deciding whether to enter into negotiation and for deciding general collaborative goals, ultimately a considerably more detailed and complex needs assessment must be performed. While suggestions for conducting the needs assessment are placed here, many collaboratives undertake a needs assessment as their first officially delivered service *after* organization. If the assessment is conducted prior to completion of an organization plan, however, service delivery and program needs will be easier to develop and can be more precisely articulated.

Needs Assessment

STEP 6: refining needs assessment instrument

This more comprehensive assessment activity begins with the design of an appropriate data collection instrument that can be used by each member to record appropriate data. An example of such a form that was developed by the study team for use with a group of communities who agreed to pilot test this process can be found in Chapter 4, along with instructions for its use and analysis.

STEP 7: conducting the needs assessment

The objective of this activity is to return to your district and with the superintendent's approval, to collect information that will be useful in clearly defining the needs of specific target groups, the types of services each target group needs, the current cost to each member of providing such services and the length of time it is anticipated that the service will be required. This activity is essential to determine the basis for collaboration. A second use of this data is in identifying the resources within each member community that can be tapped to meet objectives.

STEP 8: synthesizing data across districts

When these results are combined in a cross-district assessment (directions for this activity are also included in Chapter 4), the high priority common needs of members can easily be identified and rank ordered. From this cross-district comparison, members can establish priorities for service delivery. For each desired program, the following should be considered:

- *the number of communities involved*
- *the number of students in need of service*
- *the program's requirements in terms of staff, space and materials*
- *existing resources*
- *funds required*

STEP 9: program priorities identified

Pragmatic considerations can then be applied to narrowing the choices and to identifying which programs the group is most likely to be able to begin immediately and which must be deferred or are of lesser need.

It is recommended that newly forming collaboratives be realistic about what can be accomplished. Rather than try to accomplish too much at the outset, it is better to operate a single program successfully in order to give yourselves time to iron out the bugs which appear in any new structure.

PHASE 2: DETERMINING THE COLLABORATIVE'S STRUCTURE

STEP 10: second planning meeting

The collaborative's governance and organizational structure should be directly related to the type of programs and services that are needed by the collaborative's members.

As discussed in Chapter 1, there are basically two kinds of collaborative agreements: informal and formal. A formal agreement implies state approval and has a more defined governance structure. It also allows the collaborative to apply for certain funds for which informally organized groups would be ineligible. Each type of arrangement has certain advantages, however.

Informal Agreements

In situations where only a few students need to be served for a relatively short period of time, or if no formal agreement can be reached, informal arrangements might suffice. Itinerant teacher and tuition contract programs are examples. Such an arrangement allows for flexibility in organization and operations and the potential to operate within the regular school budget with existing staff. The commitment of each participant is generally short-term.

Such agreements, although they involve collaboration, do not really constitute a collaborative, although they are good testing grounds through which a more formal relationship could develop. They are authorized under Chapter 40, Section 4A, G.L. 1970, which provides that any governmental unit may enter into an agreement with one or more other governmental units to perform jointly any service or undertaking which each contracting unit has authority by law to perform.

The contracting units in this case are the school committees, each of whom must provide written authorization in order to participate. It is common practice for the authorization to specify the type of service to be provided or exchanged, the time period, the cost etc. It is also vital that there be clear understanding on which district controls the program. For example, suppose three communities agree to collaborate on a program for developmentally disabled students. It may make administrative sense to have separate classes for each of three age groups, each class based in and staffed by one of the districts. The agreement might state that each district has control over that program being run in its school. Alternatively, a joint advisory committee might be created so that there was input from each participating district.

In another case of informal collaboration, a school district running a class for visually impaired students may agree to accept out of district students into the program on a

tuition basis. In most relationships of this type, the district running the program has complete control over it, although liability for the student is maintained by the referring district.

Not all informal collaborative relationships involve classes or students. Consider that one community might run an excellent teacher training program or employ a specific administrator skilled in proposal development or evaluation. These are fruitful fields for informal collaboration, assuming that each community at some point can return the favors, so to speak.

Whether an informal agreement is written or verbal, there is rarely an official organizational or governance structure. The important actors are usually the superintendents and special education directors who negotiate on the basis of immediate needs. Although informal collaboration is not eligible for state funding under Chapter 797, it provides an effective vehicle for serving a small number of students or an administrative need without establishing a top heavy organizational structure or creating another bureaucratic layer.

Section 4A of Chapter 40 requires that such agreements may be terminated on authorization of any participating school committee, provided that notice of such termination is given to each other party to the agreement at least 60 days prior to the date of termination.

Formal Governance

This type of agreement depends on a firmer commitment from participants, must be structured according to Chapter 797, and must be approved by member school committees, the Regional Education Center, and by the Commissioner of Education.

One advantage of formal state approval is the potential for receiving incentive funding under Chapter 797.

The law reads:

Upon the recommendation of the department of education, the state treasurer shall annually disburse to certain educational collaborative boards a monetary grant . . . not [to] exceed a total sum of ten thousand dollars per individual city, town or regional school district . . .

A budget request for $500,000 for FY 1976 has been submitted by the Bureau of School District Reorganization and Collaboration, but criteria have not yet been developed for the awarding of such funds. At this point, there is some question as to whether these funds will be appropriated.

STEP 11: governance

Chapter 797 also stipulates that a collaborative board shall be created and shall be comprised of one representative from each member school committee and a representative of the Massachusetts Department of Education Regional Center in which the majority of member municipalities are located. The board must appoint an executive officer and adopt an appropriate name for identification. Note, that although the law stipulates that certain people must serve on the board, it does not exclude additional members, e.g., superintendents, who are not specifically referred to in the legislation.

Several existing collaboratives, structured under Chapter 753, have requested a ruling from the Office of the Commissioner of Education on the legality of their governing boards. A number of these boards consist of superintendents or directors of special education from member districts, rather than a member of each school committee as stipulated in Chapter 797. On January 14, 1975 the Legal Office of the Department of

Education issued a memorandum noting that Chapter 797 collaborative board requirements could still be met if the school committee member delegates his or her authority to serve on the board.

On this same subject, the question has also been raised whether Chapter 753 structured collaboratives are eligible for Chapter 797 incentive funding. It has been suggested that they would be if they were to expand membership or service delivery, but as this is written, it is unclear what level of change constitutes eligibility.

cost to member communities

STEP 12: membership fees and tuition

The initial capitalization of a formal collaborative is likely to come from the membership. In order to become a member, most collaboratives require an annual assessment ranging from $1,000 to $10,000 per member, based either on a flat, equal rate, or on a per pupil rate to compensate for differences in the sizes of student population among member districts. This membership assessment generally guarantees to each district a certain level of services from the collaborative. For example, if the collaborative is to operate two programs, one for hearing impaired students in the 5-10 year old age range, and one in secondary vocational education for physically handicapped students, either all members might be guaranteed the same number of enrollments in each program (if all fees were equal) or might have a number proportionately based on their enrollment. The membership fee might also guarantee to members a certain level of administrative services such as a complete needs assessment, or the design of a cost effective transportation system. Some collaboratives have found that over a period of time they have been able to decrease the annual assessment because they have been successful in tapping other sources. But membership funding is almost always necessary to get started. To facilitate collaborative initiation, MACE has been working on developing an agency which would arrange loans to educational institutions under certain favorable circumstances. It is hoped that this "bank" agency can be operating on a modest scale by the fall of 1975.

Members can also support a collaborative by buying certain services, such as core evaluations, in-service training programs and additional student placements at agreed upon rates. Determining a fair service rate is often a problem and there appears to be no perfect solution. The difficulties in any tuition plan stem from the condition of not having enough students to fill a class, or from losing enrollment at some point after the program begins. The easiest method appears to be to divide the total cost of the program by the number of students enrolled, billing each LEA for their own students. However, there must be a contingency plan developed for a mid-year decrease in enrollment. One possibility is an understanding that excess costs will be divided proportionately among remaining members' students, in effect increasing their tuition.

In some instances, a collaborative may wish to develop a general contingency account that can be applied toward meeting unexpected expenses. Such an account can be created either by increasing the membership assessment or raising the tuition, with the agreement that such funds will be reimbursed annually if they are not used.

A second tuition-setting option is to divide the total cost of the program by the number of members in the collaborative. Under this plan, members must be willing to look at the long-term picture, as there may be some years when one member has no students in the program. This method is similar to insurance. Members are paying for the availability of the program. A decision must be made, however, whether the availability is unlimited, or limited to a specific number of enrollments.

Because of the intricacies and uncertainties involved, many school districts have relied on informal agreements in the hope that over a period of time, all factors would balance out. In some cases, a single LEA may have a dozen or more such agreements, each developed as specific program needs were identified. The advantages of standardizing a tuition exchange program through a formal collaborative are that the terms are established in writing, and all parties involved agree to them for a specified period of time, allowing such programs to begin with a firm foundation. Formalizing the agreement also minimizes the number of bookkeeping transactions, as accounting is centralized through the collaborative.

determining bylaws

STEP 13: bylaws

Formal collaborative agreements should be refined through a set of bylaws that outline the operating procedures of the collaborative. It is particularly important that the relationships between a collaborative director and the board of directors be defined. In addition, criteria should be established for various levels of decision-making, such as policy decisions vs. procedural decisions, in order to avoid unnecessary conflicts between the board and the staff.

Among the issues normally addressed by the bylaws are:

- *purpose*
- *membership*
- *policies on meeting times, quorums, notifications, minutes, agenda*
- *election of officers with their terms and duties*
- *composition of the board beyond that regulated by statute*
- *procedures for changing or adopting policy*
- *policy on expansion of membership*
- *personnel policies*
- *policy on serving non-member communities*
- *statement of budgetary procedures*

Many of these policies are standard parts of any organization's bylaws and do not need to be discussed in detail. Others relate specifically to collaboratives, and require a discussion of alternatives.

Personnel Policies

The way in which a collaborative staff is hired is not regulated by law. Formal and informal collaboratives share four common methods to employ staff. These are:

- *to use existing special education personnel from member communities*
- *to have host community hire staff and bill other member communities*
- *to have each member provide new positions equally or on a pro-rated basis*
- *to hire staff with grant monies through an LEA*

One additional benefit of establishing a formal collaborative is that it offers another vehicle by which staff can be hired. Formal collaboratives, under Chapter 797, must establish a collaborative fund. These monies can be used to hire personnel to operate the collaborative and its programs. As such, these individuals must be considered employees of the collaborative, and not of the member systems. Many collaborative directors have pointed out that collaborative staff should be clearly informed of the specific terms and

limitations of their employment, so as to avoid later confusion related to such matters as tenure, retirement and other fringe benefits. These issues should be resolved and granted at the pleasure of the host LEA or the collaborative board, depending on the nature of organization.

Expansion Policies

Most collaborative agreements require the unanimous approval of all members before a new member can be added.

Service to Non-member Students

There appear to be far more advantages than disadvantages to opening collaborative programs to non-members, provided that policies and procedures are clearly established. Accepting such students will help the collaborative keep class sizes at ideal levels, thus reducing costs, and may open up cooperation with districts that provide services unavailable within the collaborative's boundaries. The primary disadvantage is the possibility that a non-member student may take a place that is later needed by a member. Outside referrals should not be accepted until all members have been given the opportunity to fill available slots. Even then, the collaborative might consider reserving some slots on a contingency basis, if it can afford to operate the program in this way (i.e., if members agree to split the difference if the slots remain empty). Once a non-member student has been accepted, the collaborative does have an obligation to continue serving that student at least for a period of time. Any agreement should specify the duration of the commitment.

Termination

Chapter 797 provides for the possibility of terminating membership by any party so long as that party issues written notice to each other member at least *six months* before the end of a fiscal year. Note, however, that if the membership changes – through expansion, reduction or replacement – the collaborative is considered to have a new structure and must reapply for state approval.

collaborative agreement

STEP 14: written agreement

Once revisions of the collaborative agreement and bylaws have been made by the planning group and superintendents, the final document must then be approved by participating school committees. The formal collaborative agreement must include:

- *the purpose of the program or service*
- *participants*
- *the duration of the agreement*
- *the approximate amounts to be contributed by each city, town or regional school district*
- *the cost-saving aspects of the program or service*
- *the method of disposition of unencumbered funds and equipment upon termination*
- *any other matters not incompatible with law which the committees deem advisable*

obtaining approval

STEP 15: approvals

It is likely that the planning thus far described can be accomplished by special education directors, acting under the authority and advice of their superintendents. When a draft of an agreement is prepared, each superintendent should be fully briefed and a meeting of all superintendents called. When all superintendents have accepted the terms of the agreement, it is ready for presentation to the school committees. It would be wise to inform the school committee about deliberations, at least informally, at a point earlier than this.

In presenting the concept of collaboration to school committees, there are three points that must be made:

1. The purpose of collaboration is to provide educational benefits in a cost-effective manner. This cost effectiveness must be documented in your application for state approval.
2. The money that an LEA may invest in a collaborative often takes the place of other line items in the special education budget. It may just be a transfer of funds rather than a new item.
3. Every member school committee must, by law, be represented on the board of directors of the collaborative, and thus has regular opportunity to participate in and influence all decisions on the collaborative's programs and policy.

Once approved by each member school committee, five copies of the collaborative agreement, signed by each school committee chairperson on the original copy, must be sent to the coordinator of the appropriate Regional Education Center.

Upon approval, four copies will be sent to the Bureau of School District Reorganization and Collaboration. The final level of state approval issues from the Commissioner of Education.

These documents allow a collaborative to become an officially recognized organization. They are, however, merely an agreement to collaborate, and prior to delivering services, more planning will be required in the areas of organization and finance.

summary

CHAPTER 797 APPROVED COLLABORATIVE AGREEMENTS

Important Components

1. purpose
2. participants
3. duration of the agreement
4. amount of money contributed by participant community
5. cost saving aspects of program
6. method of disposition of unencumbered funds and equipment upon termination
7. any other matters not incompatible with law

Bylaws

1. purpose
2. membership
3. organizational structure
4. voting distribution
5. administration responsibilities
6. employment practices
7. fiscal operations and responsibilities
8. expansion policies
9. amendments and resolutions
10. effective dates of agreement

Procedures

1. collaborative agreement approved by each school committee
2. collaborative agreement signed by all participant school committee chairpersons

3. establish collaborative fund
4. five copies of agreement submitted to Regional Education Center

INFORMAL AGREEMENTS TO SERVE STUDENTS (CHAPTER 40, SECTION 4A [1970])

Optional Components

1. type of service
2. amount of money contributed
3. duration of program

Procedure

1. written authorization from each participating school district

PHASE 3: DEVELOPING PROGRAM DESIGN

important considerations

Decisions on program design related to management and organization of the collaborative should be concurrently considered during the formative process described in Phases 1 and 2. It is presented here to assist in more detailed planning for each program to be offered through the collaborative. Such a plan should include:

1. statement of need (students to be served; number; current method of service; etc.)
2. description of program or service
   a. objectives
   b. approach (e.g., administrative or direct service; 766 prototype; where it will be delivered; to whom it will be delivered; etc.)
   c. duration
3. description of how program or service will be developed, if applicable
4. program management plan, i.e., a definition of the roles and responsibilities of each service provider
5. criteria for evaluating program objectives; roles and responsibilities of the board of directors, advisory council and staff should also be evaluated
6. program costs
   a. existing
   b. developmental
   c. operational
   d. to each member
   e. cost effectiveness compared to existing or optional programs
7. funding sources
8. statement of projected benefits

If program designs are developed under these relative criteria, determinations can be made as to those programs which can be instituted immediately and as to those which require additional planning.

role of the collaborative

Administrative decisions should be made to determine the role of the collaborative in program operations. Essentially, two options are available. The collaborative can fulfill the responsibility of coordinating programs that originate in the member communities by managing such services as student transfers, tuition payments and transportation. On the other hand, the collaborative may choose to become a service provider in order to sponsor programs unavailable in the member districts.

program control

Either of the two approaches mentioned above carries important implications for program control. Programs that are coordinated by the collaborative normally are controlled by the sponsoring school district. Under this plan, staffing and budgetary matters are acted upon by the sponsoring school committee. If, on the other hand, the collaborative is designated as a service provider, then programs are controlled by the collaborative board and administered by the director. Unless the collaborative utilizes a member district to employ staff, they become employees of the collaborative. Further, if programs are operated by the collaborative, the board of directors controls fiscal matters and authorizes payments.

The collaborative board may wish to establish procedures for the equitable distribution of program responsibility across member districts. A policy of this nature could prevent potential problems as additional programs become necessary. Another issue in designing programs may be the need to establish a policy regarding the allocation of pupil spaces to the member communities.

PHASE 4: DEVELOPING A FINANCIAL PLAN

leading a collaborative

The day-to-day operations of an effective collaborative organization require considerable administrative and managerial skill. Although this may seem obvious, it is often lost sight of in the process of reaching toward a goal of educational excellence. There is no question that a collaborative director must have knowledge of and experience in the development of special educational curricula. Although we have not dealt with the specific design of such programs in this book, they are obviously the cornerstone of the collaborative's activities.

Yet other skills and activities are of equal importance if the organization is to fulfill all its goals. These include:

- *knowledge of all laws pertaining to special education and educational finance*
- *knowledge of and experience in fiscal management*
- *experience in administrative supervision*
- *experience in program and proposal development*
- *skills in communications*
- *skill in fund raising*

budget preparation

Before a collaborative can become fully operational, a system for managing the collaborative's funds and for translating funds into programs must be developed. Effective decision-making in this area is essential to insure smooth delivery of services and harmonious relationships among collaborative members.

Depending on the type of collaborative relationship, it may be necessary to prepare several budgets. Program budgets should be shown separately from operating budgets. An operating budget refers to administrative services needed by the collaborative community, such as supervision and coordination. Although there may or may not be a director hired to serve the collaborative in these ways, someone must assume a coordinating role. Thus an operating budget might include the following items, each of which should note a percentage of time devoted to collaborative matters:

Director	Rent and Utilities
Secretary	Office Supplies and Equipment
Fringe Benefits	

A program budget differs in that it relates to costs associated with specific service delivery. For example, if the program is a special education class, there is likely to be:

Supervisory Personnel
Teaching Personnel
Fringe Benefits
Facilities and Materials

Costs can be estimated by determining the tasks to be performed, the time necessary to perform each task, and the role responsibilities of staff.

Having determined the real costs involved in a collaborative, one can then analyze the budget for how each cost is to be met. Consider the following budget for a special education class serving 12 students.

Head Teacher – full time	$10,000	
Assistant Teacher – full time	5,000	
Administrator – 10% of $18,000/year	1,800	
		$16,800
Fringe Benefits for Personnel – 10%	1,680	
		18,480
Classroom Space and Materials	9,000	
		27,480
Cost Per Student		2,290/year

Consider now that one community might contribute the services of the head teacher, a $10,000 value, or the equivalent of approximately four student enrollments. If that community had fewer than four students in a particular year, the excess might be credited to their account or applied to their membership fee. The same process could be applied to each other line item. Through this process, the amount of cash that is still required can be determined and divided among the members.

The sum of fees paid by members may determine which services can initially be provided through the collaborative. Alternative budgets should be prepared to identify the immediate financial plan and how programs will be added when and if additional funds become available. A strong case can be made for budgeting more than is expected in order to develop a contingency or emergency fund to cover unanticipated expenses.

fiscal management

Chapter 797 stipulates that "each collaborative board must establish and manage a trust fund, to be known as the educational collaborative fund . . . (and that) all monies contributed by the member municipalities, and all grants or gifts from the federal government, state government, charitable foundations, private corporations, or any other

source, shall be paid to the educational collaborative board and deposited in the aforesaid fund."

The law also states that "the treasurer of the member city or town which has the largest population according to the latest federal census of the cities and towns forming each educational collaborative shall serve as treasurer, without compensation." It is the responsibility of the treasurer to receive and disburse trust fund monies, although the collaborative board authorizes final approval for payments.

Note that the proposed guidelines for Chapter 797 (Appendix A) suggest that upon agreement of the legally-identified treasurer, the role can be delegated to another district. This would allow for considerably more flexibility in fiscal management because it implies that the role of treasurer can be assumed by different districts for different programs. This would be advantageous in situations where a collaborative was running several programs, not all of which are subscribed to by all its members. It also means that larger cities and towns, which may be members of more than one collaborative, are not always expected to assume the heaviest administrative responsibility, a situation that might seriously jeopardize their willingness to participate in collaborative ventures and backfire into isolation. Further, the flexibility of delegating this role allows collaboratives organized under Chapter 753 to delegate the authority of treasurer to whatever district currently serves as its fiscal agent.

Many different approaches may be used to manage funds. Following are three alternatives.

Host Community

In this fiscal management system, one community assumes responsibility for the operation of the collaborative program or programs. Other members are charged directly for their use of the programs by the host LEA, usually through a flat tuition.

This is an effective method when the collaborative is dominated by one member community, and particularly when the program is already established in that community. Cooperative planning is essential in order to ensure that participating communities allow for this expense in their budget submissions and that the host community can accurately forecast costs (i.e., student enrollments) for the upcoming year. Under this system, the host community exercises control over the operation of the program(s) and has final approval of all payments.

Many collaboratives presently coordinate several "host community" programs, each sponsored by an LEA. All member towns are eligible to enroll students in these programs and tuition payments equalize the cost of student exchange across districts. Each school district has total control and responsibility for those programs it sponsors.

Such a plan might be considered when the cross-district needs assessment shows that the majority of programs and services required are currently available somewhere in a member district. The collaborative, in this case, might take responsibility for placing students and assuring that expensive programs are not needlessly duplicated.

This method would also be appropriate when an LEA is used as a conduit for funds, i.e., when grants have this as a requirement. Although the LEA would maintain control over the program as fiscal agent, the program could be developed and operated through the collaborative.

Developing a collaborative around a grant has advantages and disadvantages. It can provide a testing ground for collaboration without exposing any particular member to risk, but as risk and commitment are two sides of the same coin, it may in the long run be a weakly structured organization, developed for the wrong reasons. If, however, operating

through a grant is part of a well thought out strategy, it then gives the collaborative time to develop alternatives for future plans.

Shared Responsibility

Under this system, two or more member communities contribute to the delivery of a particular service or program and each sponsor assumes partial responsibility. The multiple host approach can be achieved in many different ways. For example, towns within a collaborative may need to establish a new type of service and decide to sponsor jointly and provide that service; or, one community may provide a facility, another the staff, another the materials. There is no need to establish a separate collaborative fund or administrative structure because all costs can be met within the regular special education budgets of the sponsoring communities. In effect, fiscal management is handled cooperatively, but separately, by all school districts sponsoring the program.

This approach has proven most effective for informal collaboratives. The intent is to provide necessary programs and services, without duplicating effort in participating communities; and to permit cooperative curriculum planning. This approach, however, requires careful cooperative planning, prior commitment, and budget approval by all participating communities. One obvious difficulty is that an early budget submission date tends to hamper effective program planning. Program designs must be based on specific needs which were identified during the preceeding school year.

Collaborative Fund

The establishment of a formal collaborative fund strengthens a collaborative, because it gives the collaborative organization a means of meeting its financial obligations without getting approval from each and every school committee each time a bill is due. It also reduces the administrative load for separate members, for example, when the collaborative administers grants. Although the treasurer is still associated with a particular member community, for the purposes of the collaborative fund he or she acts on the approval of the collaborative board rather than the LEA school committee. The collaborative fund allows each member a voice in decision-making, yet promotes some degree of flexibility for the organization.

The major impediment to immediate implementation of all desirable programs and services is likely to be money. Programs that appear to require external funding will be readily identified through the program implementation plans. Because these amount to proposals, the collaborative will be in a strong position to study the guidelines of different funding sources and plan their submissions accordingly.

Whether participating in an informal or formal collaborative, members should realize that fund raising and proposal writing consume a considerable amount of time. With this in mind, any decision to employ a director should include fund raising skills as one of the criteria for employment.

In general, there are three primary sources through which outside funds can be raised:

1. State Agencies
2. Federal Agencies
3. Foundations

In evaluating these options, it is wise to make a distinction between relatively unrestricted funds and specifically allocated program development funds. Even small grants may be of value if several grants can be combined to provide for a complete

program. For example, some grants provide only for program development while others restrict service delivery to a specific population.

It is obvious that competition for all funds is extremely high. In Chapter 2, we discussed methods through which proposal development could be coordinated through the collaborative so that member LEA's were not in direct competition. It should be the collaborative director's responsibility to assure that the organization is on the mailing list of all possible funding sources.

State Agencies

The primary state agency for educational funding is, of course, the Department of Education. Information and assistance should be sought from the Regional Education Center in your area.

Beyond the Department of Education, there are other state agencies that can offer supportive services. In general, their services fall into three categories: evaluation, treatment and special education programs. Relevant human service agencies in this regard are:

Department of Mental Health
Department of Public Health
Department of Public Welfare
Department of Youth Services
Office for Children
Massachusetts Rehabilitation Commission

As of this writing, these agencies are still in the process of developing guidelines for service delivery and responsibility. It is recommended that interested districts officially request to be put on the mailing list to receive guidelines as they become available. A listing of various agencies with special education liaisons (SPEL) was issued by the Department of Education to superintendents on November 1, 1974.

As mentioned earlier, Chapter 797 can potentially provide for direct financial support by the state, through the Bureau of School District Reorganization and Collaboration, to encourage and promote new collaboratives.

Section 18A of Chapter 492 provides for reimbursement of monies from the General Fund for special education programs responding to Chapter 766. By this means, member communities might recover some of the costs incurred by these programs.

The summary report and recommendations of the Governor's Commission on School District Organization and Collaboration published in October 1974 by MACE cites two recommendations related to collaboration. Recommendation #7 proposes an educational bank for promotion of collaboratives. Under Recommendation #8, the exchange of information on learning and collaborative alternatives being tried across the Commonwealth is cited as one of the tasks worthy of productive attention.

Federal Agencies

An obvious source of financial assistance for communities involved in collaborative programs is through federal grants. Some grants are designed to support programs for specific disabilities, while others can be used to plan collaborative programs and operations.

The following information identifies sources of state and federal funding which will become available at various times throughout the year. All sources should be explored through the Regional Education Centers to determine application guidelines.

federal funding

1. Elementary and Secondary Education Act
   - Title I – Financial assistance to LEA's for education of children of low-income families
     - *Part C*: Special grants for urban and rural schools serving areas with the highest concentrations of children from low-income families
   - Title III – Supplementary educational centers and services; guidance, counseling and testing
   - Title V – Strengthening state and local educational agencies
     - *Part B*: Local educational agencies
     - *Part C*: Comprehensive planning and evaluation grants
2. Program for Education of Handicapped Children in State Operated or Supported Schools (PL 89-313)
3. Higher Education Act
   - Title V – Education professions development
     - *Part D*: Improving training opportunities for personnel serving in programs of education other than higher education
     - *Part F*: Training and development programs for vocational education personnel
4. Developmental Disabilities Funds (PL 91-517)
5. National Defense Education Act
   - Title V – Guidance, counseling, and testing: identification and encouragement of able students
6. Vocational Education Act Programs
   - Title I
     - *Part B*: State vocational education programs
     - *Part C*: Research and training in vocational education
     - *Part D*: Exemplary programs and projects
     - *Part E*: Residential vocational education
     - *Part G*: Cooperative vocational education programs
7. Education of the Handicapped Act
   - Title VI
     - *Part B*: Assistance to State for education of handicapped children
     - *Part C*: Centers and services to meet special needs of the handicapped
     - *Part D*: Training personnel for the education of the handicapped
     - *Part E*: Research and demonstration projects in the education of the handicapped
     - *Part F*: Instructional media for the handicapped
     - *Part G*: Special programs for children with specific learning disabilities – model centers
8. Federal Community Mental Health Centers Act

The great advantage of obtaining such a grant for special education programs is that it removes a financial burden from the LEA's. It also gives the collaborative time to plan how program costs can be apportioned when the federal funds expire.

Foundations

Private foundations can provide financial support to collaborative programs, and are a rarely tapped resource. In Massachusetts alone there are over 100 foundations that have previously given for educational purposes. The *Foundation Directory* gives considerable information about each such organization in the United States, including the types of projects they support, and the amount of money and number of grants that have been made in a given year. The latter information is particularly important because it tells you the average amount of a typical grant. In many cases, this is under $1,000. It is important to ascertain if these funds can be combined with others, and, if not, to decide if it is worth expending effort and money to submit the proposal. Because foundations usually have restrictive purposes and receive many requests, they should not be approached without thorough investigation and preparation.

CHAPTER 4: COLLABORATION AS AN ON-GOING RELATIONSHIP

introduction
•
needs assessment
•
planning and evaluation

introduction

Changes in any organization are inevitable, even when operating under the most considered plan. Recognizing the implications of accelerating change and uncertainty, it was considered essential to provide school administrators who are or plan to be members of collaboratives with useful guides that can assist them in adapting their collaboratives to future needs. For example, when guidelines for Chapter 797 are complete and approved, the governance structure may require alteration; as districts complete more CETs, the numbers of students requiring particular types of services may fluctuate markedly enough to cause some programs to be oversubscribed and others undersubscribed; as administrative tasks become accomplished, the sense of mission may recede and require reevaluation; as students' educational plans are reevaluated, changes in curriculum structure may become necessary. These factors should not be construed at all in a negative sense; they are part of the growth of any organization. The ultimate success of the organization, however, depends on its ability to be responsive to these changes.

The chapter is divided into two sections: Needs Assessment and Planning and Evaluation. The needs assessment approach was developed, tested and refined, in part, with the assistance of the Metropolitan Pilot Test Area Task Force, a group of special education directors who met periodically during the study to discuss and evaluate strategies that were devised by the project team. It will be particularly helpful in defining the programmatic needs of a collaborative, and when combined with the section on planning and evaluation will offer a full analysis of an organization's status and direction.

needs assessment

Members or potential members should first complete the assessment on the basis of data available in their own district. A cross-district analysis can then be performed by lining up each district's responses to individual questions so that they can be read from left to right, each district's data being entered in a single column. The purpose of comparing data across district lines is threefold: to identify common gaps in service delivery; to identify common overlaps in service delivery; and to ascertain if collaborative groupings could serve students in a more cost effective manner. The questions presented in the following section, Planning and Evaluation, will also be helpful in analyzing the data collected.

PART 1: number of special needs students

To determine whether collaboratively-run programs might benefit some or all of your special education students, it is necessary to know how many students you need to serve, the nature of their handicaps, and the type of educational plan that will be of benefit.

Because we are interested primarily in serving the low-incidence handicapped population through collaboration, only the following handicaps are considered in this section: severe emotional disturbance, severe mental retardation, deafness, blindness, severe physical handicaps, multiple handicaps, and severe language impairment.

The following form asks you to record data about these special needs youngsters according to their age and type of program.

Program Key

1. Regular Day with Modifications – Up to 25% (Prototypes 1 and 2)
2. More than 25% Separation (Prototypes 3 and 4)
3. Special Day School (Prototype 5)
4. Special Residential School (Prototype 6)
5. Home or Hospital (Prototypes 7 and 8)
6. Not Yet CET'd But in Public School Program
7. Not Yet CET'd But Served Through Other Than LEA

Handicap	Age	PROGRAM TYPE (see key)							Total
		1	2	3	4	5	6	7	
Severe Emotional Disturbance	3-5								
	6-15								
	16-21								
Severe Mental Retardation	3-5								
	6-15								
	16-21								
Deafness	3-5								
	6-15								
	16-21								
Blindness	3-5								
	6-15								
	16-21								
Severe Physical Handicaps	3-5								
	6-15								
	16-21								
Multiply-Handicapped	3-5								
	6-15								
	16-21								
Severe Language Impairment	3-5								
	6-15								
	16-21								

Cross-district Analysis

A primary purpose of Part 1 is to gather information you will need in Part 2. Certain preliminary judgments can be made, however, on this information alone. For example, districts with no students in a category can be eliminated from discussion of services to that category. Districts with a large number of students in a particular category are likely to have programs operating that serve those students. If a single program type consistently has only a few students in each age group, that area may well prove fruitful for a collaborative program. Districts with a relatively large number of students in Program Types 6 and 7 may have need for assistance in completing CETs.

PART 2: current program/service resources

In order to assess priorities across district lines in a way that permits you to specify program needs, it is helpful to have each district report their current offerings according to a pre-defined module. The smallest module is the one that is most specific and includes a handicapping condition, an age group, and a type of educational plan. For example, you will want to determine if there is a need for a residential program for students between the ages of 6 and 15 who are severely mentally retarded.

The following chart will give each district a common reporting format for each possible program module.

COMMUNITY _____

HANDICAPPING CONDITION _____

AGE GROUP _____

PROGRAM TYPE _____

NUMBER OF STUDENTS IN CATEGORY _____

1. Current services or programs available directly from LEA. Complete the following for *each* program or service that is part of an educational plan for students in this module.
   a. Type of program or service
   b. Cost per student or service unit
   c. Personnel associated with program or service. List title and percentage of time allocated to program.
   d. Maximum enrollment or case load
   e. Current enrollment or case load from district students
   f. Current enrollment or case load from out of district students
2. Current services or programs available through outside linkages, including collaborative agreements. Complete the following for *each* program or service that is offered to students in this module in this manner.
   a. Type of program or service
   b. Agency providing service
   c. Relationship of LEA to service provider
   d. Cost per student or service unit
   e. Number of students served through this relationship

Cross-district Analysis

This format, although it must be repeated many times to cover all possibilities, provides the potential collaborative with the most significant data for program planning. It also provides a complete resource bank. Thus, if the collaborative were to decide only to coordinate programs, rather than to run them directly, all district resources would be on file.

When all responses have been received and filed by module, an analysis of services needed in each module can be performed. It is likely that earlier meetings will have established some basic priorities for service delivery and these are the modules that should receive attention first. If no priorities have been established, Part 1 should yield some categories that appear more fruitful than others.

The following questions should prove helpful in analyzing modular data:

- Are there a number of similar services provided among members, each of which is undersubscribed?
- Are there some districts which can offer no services in an area?
- Are costs of similar programs similar?
- Could the services purchased through outside linkages be provided by the collaborative or through another district's current offering?
- Could personnel be shared?
- Could facilities be shared?

If transportation has been identified as a possible area of collaboration, each district should respond to the following:

1. How many special needs students are currently being transported within district boundaries?
2. What is the average distance travelled? What is the shortest distance travelled? What is the longest distance travelled?
3. What is the average annual cost per student for such transportation?
4. List in order of usage the three most frequently used modes of transportation, noting the fewest and greatest number of students transported in a single vehicle per mode.

Mode	Total # Students	Fewest/Vehicle	Greatest/Vehicle

5. How many special needs students are currently being transported to locations outside the district boundaries?
6. What is the average annual cost per student for such transportation?
7. List those locations to which you currently send students, the number of students involved, the mode of transportation used, the average distance travelled, and the average annual cost per student.

Location	# of Students	Average Distance	Mode	Average Annual Cost/Student

Cross-district Analysis

The purpose of this analysis is to determine if there is a need for the collaborative to assist districts in coordinating transportation systems or if a joint purchase agreement for either services or vehicles could reduce the cost to individual districts.

The following questions will help analyze this data:

- Are students from different districts travelling to the same location? Could they be combined on one route or in one vehicle?
- Could costs be reduced through a joint purchase agreement where the same mode of transportation is used by different districts?
- Will potential collaboratively-run programs change the transportation needs of districts?

PART 4: funding resources

Many school districts operate programs or provide services through sources of funding other than the regular school budget. In some cases, these programs can accept students from out of district; in others not. Even in the latter case, however, it may be possible to renegotiate with the funding source to allow for this possibility.

Program development grants will also be of importance to the collaborative. If the program is useful to several members, the grant funding may be considered an in-kind contribution from the member holding the grant.

For each situation that includes outside funding, members should list:

1. Funding sources
2. Purpose of grant
3. Amount of grant
4. Possibility for serving other districts through grant

PART 5: general collaborative interest

1. Does your district operate through other collaborative agreements? If yes, note:
   a. Name of collaborative
   b. Members
   c. Purpose
   d. Services rendered
   e. Financial arrangements
   f. Managerial arrangements
2. Comment on the effectiveness of past and present collaborative relationships.
3. In what ways could a special education collaborative be of service to you? What are your priority needs?
4. In setting up a cross-district collaborative in special education, what organizational recommendations would you make?

planning and evaluation

In this section, an on-going evaluation and planning process is presented in worksheet form. As every collaborative relationship is likely to be unique and designed specifically to fill particular needs of its members, it would be impossible to cover every conceivable area of inquiry. Not all the questions have straight-forward responses; many may not even apply to the organization of which you are a part. Yet it is possible to identify those areas that are necessary to review on an on-going basis.

The completion of this section is vital for those wishing to design a new collaborative program or to improve existing ones. If your organization is just getting underway, it may not seem of importance at the moment. But it will become critical in six months. It will also prove helpful as a quick review prior to signing a final agreement and would serve well as the agenda of an annual collaborative board or advisory committee meeting.

The following eight worksheets are divided into the two major topics of planning and evaluation. Each topic is then divided into four sections addressing the topics of organization, management, programs and finance. This information is designed to provide assistance for:

- following sequential steps in forming a collaborative
- on-going planning and evaluation design
- assessing the collaborative's experiences after the first year of operation
- planning adjustments, revisions, and budget for continued operation

The worksheets are intended to be considered in a time frame for the planning and improvement of collaborative efforts. They will lend strength to the initiation of the collaborative organization as well as to its chances for long range service to children with special needs.

1. Will the same LEA's confirm continued participation?
2. Do additional LEA's wish to join?
3. Has one of the original participants terminated?
4. Does the collaborative agreement require changes?
5. Are existing bylaws sufficient?
6. What contingency plans are necessary?
7. Are representation and voting privileges satisfactory?
8. Is clarification of roles and responsibilities of the board necessary?
9. Can additional programs be added if desired?
10. Is the board effective in fulfilling the collaborative's objectives?
11. Are reporting procedures adequate?
12. Are obligations and benefits clearly understood by participating LEA's?
13. What linkages to other LEA's and/or resources might increase the value of services rendered and/or lower the cost of services?
14. Can the organization benefit from applying for state approval if it has not done so?
15. Do proposed membership and/or service delivery plans require a new application for approval?
16. Is an advisory committee deemed advantageous?
17. Is parental and/or teacher involvement on an advisory committee adequate?

planning: management

1. Has a current needs assessment been conducted to evaluate existing programs and to establish new priorities?

2. Have statewide developments been considered as to how they may affect program delivery?

3. What action is needed in the following areas to improve continuing programs or to develop additional services:

- administrative roles and responsibilities
- staff
- funding sources
- cost to member communities
- fiscal management system
- facilities
- transportation

4. Have programs been analyzed for relative cost effectiveness?

5. Do new program designs satisfy Chapter 766 requirements and Department of Education regulations?

6. Do control or accountability procedures need revision?

7. Is clarification of administrative roles and responsibilities necessary?

8. Has a fiscally sound budget been developed?

9. Have linkage arrangements and funding sources been explored?

10. Has a process been developed for conducting on-going evaluation?

planning: delivery of service/programs

1. Has it been determined that existing programs should continue?

2. Has the needs survey revealed the need for new programs?

3. Has it been determined which collaborative members have common need of a new service and has a commitment been made?

4. Have administrative and management responsibilities been identified?

5. Have facilities, staff, supplies and equipment been adequately planned?

6. Have transportation plans been developed?

7. Are parents and teachers included in an advisory group?

8. Is this program planned to answer a short or long term need?

9. Is the program recommended after having reviewed other service providers?

10. What support services are required?

11. Have existing resources been utilized effectively in program design?

12. Will programs require any in-service training?

13. Are there any implications for program extension beyond the regular school year?

14. Has an evaluation process been included?

planning: finance

1. Has a budget for overhead costs been determined?

2. Has a budget for program operations been developed?

3. Do membership fees need adjustment?

4. Have costs of new programs been estimated?

5. Have participating LEA's been informed of new costs for budget allocation?

6. Have fiscal procedures been established to administer new programs?

7. Have additional bookkeeping services been considered?

8. Are there contingency plans in the event of an LEA withdrawal or lack of commitment?

9. Have outside funding sources been explored?

10. Has in-kind support been explored for possible cost reduction?

11. Have figures been prepared to relate delivery of service options to cost effectiveness?

evaluation: organization

1. Were participating school districts adequately represented on the collaborative board?

2. Was voting distribution considered equitable?

3. Were the roles and responsibilities of the collaborative board adequately defined? Fulfilled?

4. Was the collaborative board able to set policy?

5. Did the collaborative board respond to crises effectively?

6. Did the collaborative board influence program operations effectively?

7. Did the organization adequately define objectives? Purposes?

8. Was the operating agreement broad enough to allow for additional programs?

9. In what way did new collaborative legislation affect the organizational structure?

10. Were member school districts informed of collaborative decisions and policy?

11. Did members clearly understand their obligations and benefits?

12. What other agencies should have been included/represented on the collaborative board?

13. Were contingency plans effective?

evaluation: management

1. Did needs assessment accurately forecast program priorities?
2. Was a precise collaborative action plan developed?
3. Was an evaluative process developed for assessment and planning?
4. Were efforts coordinated with other service-providing agencies?
5. Was the information system effective? Were the various publics informed?
6. Were programs administered and supervised effectively?
7. Did the programs satisfy Chapter 766 requirements?
8. Were facilities adequate?
9. Was the transportation system effective?
10. In what way did statewide developments affect program delivery?
11. Were the role and responsibilities of the director adequately defined to achieve goals?
12. Were all program participants aware of and in concurrence with their roles and responsibilities?
13. Was the staff able to operate programs effectively?
14. Were contingency plans effective in responding to crises?
15. Did the collaborative satisfy its program objectives?

evaluation: delivery of service/programs

1. Did the programs meet collaborative objectives?

2. Did the programs satisfy educational plan requirements of students?

3. What support services were useful?

4. Were in-service programs effective?

5. Were instructional materials and equipment adequate?

6. Was the pupil/teacher ratio appropriate?

7. Were existing resources fully utilized?

8. In what way were advisory groups effective?

9. Did LEA's perceive the value of the service as out-weighing the cost of involvement?

10. What linkages to other LEA's, agencies or collaboratives might have improved the program?

evaluation: finance

1. Was the fiscal management system sound throughout the year?

2. Were contingency plans adequate for unexpected costs?

3. Were overhead costs budgeted?

4. Were programs cost effective?

5. Were all potential funding sources identified and contacted?

6. Were membership fees equitable and sufficient?

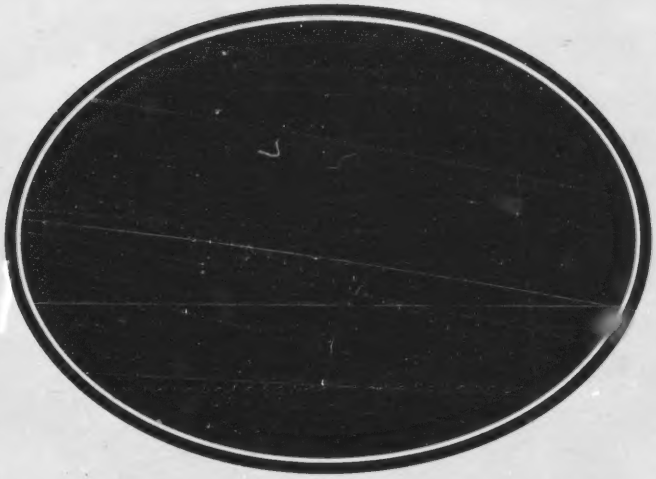
7. Were staff employment practices adequate?

8. What in-kind contributions were necessary?

9. Were human and financial resources adequate to support collaborative programs?

10. Was a reporting process established to inform the governing board and the participating school districts of how and why funds were spent?

11. Were reasonable measures developed to assure control and accountability of collaborative fiscal operations?



APPENDICES

appendix A: laws pertinent to collaboration

appendix B: case studies

appendix C: collaboratively run programs to serve special needs students in massachusetts

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appendix A: laws and regulations pertinent to collaboration

1. SECTION 4A OF CHAPTER 40 OF THE GENERAL LAWS OF THE COMMONWEALTH OF MASSACHUSETTS 1970

SECTION 4A. Governmental units may make contracts relative to performance of public services (last am. 1969, 85, 356, 758). Any governmental unit, as hereinafter defined, may enter into an agreement with one or more other governmental units to perform jointly or for such other unit or units any service, activity or undertaking which each contracting unit is authorized by law to perform, if such agreement is authorized by each party thereto, in a city by the city council with the approval of the mayor and in a town or district by a town or district meeting; except, however, that when such agreement involves the expenditure of funds for educational purposes accepted pursuant to section fifty-three A of chapter forty-four, or the expenditure of funds for establishing supplementary education centers and innovative educational programs, the agreement and its termination shall be authorized by the school committee. Any such agreement may be terminated by any party thereto at the end of any fiscal year if such termination is authorized by the terminating unit in the manner aforesaid; provided, that notice of such termination is given to each other party to the agreement at least sixty days prior to the date of termination. A governmental unit may enter into an agreement with any other governmental unit for the joint disposal of refuse, garbage or offal for a period not exceeding twenty years. The words "governmental unit" as used herein shall mean a city or town, a regional school district, or a district as defined in section one A.

All bills and payrolls submitted for work done under any such agreement shall be plainly marked to indicate that the work was done under authority thereof. Any reimbursement for or contribution toward the cost of such work shall be made at such intervals as the agreement provides. The amount of reimbursement received under any such agreement by any governmental unit shall be credited on its books to the account of estimated receipts, but any funds received under the provisions of section fifty-three A of chapter forty-four for contribution toward the cost of such work may be expended in accordance with the said provisions. The equipment and employees of a governmental unit while engaged in performing any such service, activity or undertaking under such an agreement shall be deemed to be engaged in the service and employment of such unit, notwithstanding such service, activity or undertaking is being performed in or for another governmental unit or units.

2. CHAPTER 797 OF THE GENERAL LAWS OF THE COMMONWEALTH OF MASSACHUSETTS 1974

AN ACT AUTHORIZING CITIES, TOWNS AND REGIONAL SCHOOL DISTRICTS TO ENTER INTO COLLABORATIVE EDUCATIONAL PROGRAMS.

BE IT ENACTED BY THE SENATE AND HOUSE OF REPRESENTATIVES IN GENERAL COURT ASSEMBLED, AND BY THE AUTHORITY OF THE SAME, AS FOLLOWS:

Chapter 40 of the General Laws is hereby amended by striking out section 4E, as amended by chapter 753 of the acts of 1972, and inserting in place thereof the following section:

SECTION 4E. The department of education through its regional offices shall cooperate with cities, towns and regional school districts which seek to enter into collaborative agreements for the purposes hereinafter provided in this section.

Any school committee, acting for and in behalf of its city, town or regional school district, may enter into an agreement with one or more other such committees to conduct jointly educational programs and services which permit such committees to supplement or strengthen school programs and services; provided, that such agreement has been authorized by vote of each such committee and approved by the commissioner of education.

The agreement shall state the purposes of the program or service, the approximate amounts of money to be contributed by each city, town or regional school district, the cost savings aspects of the program or service and any other matters not incompatible with law which the committees deem advisable.

The agreement may be terminated at the end of any fiscal year by written notice of termination given by any party which has entered into such agreement to each other party at least six months before the end of such fiscal year. Such agreement shall provide for the disposition, upon termination thereof, of all unencumbered funds and all equipment and supplies held pursuant thereto.

Each school committee entering into such an agreement shall appoint one person from its own membership to form a board to be known as an educational collaborative board. The department of

education shall be represented on each such board by the coordinator of the regional center in which the majority of such member municipalities are located. Each such board shall select its own executive officer and shall adopt an appropriate name for purposes of identification.

Each educational collaborative board shall establish and manage a trust fund, to be known as an educational collaborative fund, and each such fund shall likewise be designated by an appropriate name. All monies contributed by the member municipalities, and all grants or gifts from the federal government, state government, charitable foundations, private corporations, or any other source, shall be paid to the educational collaborative board and deposited in the aforesaid fund. The treasurer of the member city or town which has the largest population according to the latest federal census of the cities and towns forming each educational collaborative board shall serve as treasurer of such educational collaborative board without compensation. Said treasurer shall receive and disburse any monies of the trust fund of the educational collaborative board he serves without further appropriation.

Upon the recommendation of the department of education, the state treasurer shall annually disburse to certain educational collaborative boards a monetary grant, pursuant to regulations adopted by the board of education. Said grant shall be subject to appropriation and shall not exceed a total sum of ten thousand dollars per individual city, town and regional school district which becomes a party to each such educational collaborative program or service as provided under the written terms of a specific agreement.

3. SECTION 201, REGULATIONS OF CHAPTER 766 OF THE GENERAL LAWS OF THE COMMONWEALTH OF MASSACHUSETTS 1972

201.0 Options available to school committees for satisfying the requirements of these regulations:
The following shall apply to the satisfaction of all of the requirements of these regulations by school committees:

201.1 Each school committee shall have the following options in satisfying any of the requirements of these regulations:

201.1 (a) It may satisfy such requirements itself.

201.1 (b) It may enter into an agreement to satisfy such requirements through a regional collaborative.

201.1 (c) It may enter into an agreement or contract with a private school or public or private agency or institution to satisfy such requirements.

201.2 Each school committee which desires to choose the option described in paragraph 201.1 (b) shall submit to the appropriate Regional Branch Office of the Division, a written agreement and a plan for its implementation. Such agreement and plan shall designate one city, town or school district as the operating agent. Funds received by such operating agent from other cities, towns or school districts and from its own city, town or school district for implementing such agreement and plan, in addition to gifts and grants received from all sources, shall be deposited with and held as a separate account by the treasurer of such operating agent. The operating agent may apply all funds received, without further appropriation of such funds, to the cost of programs operated pursuant to the agreement and plan.

201.2 (a) Any facility operated by a regional collaborative shall be treated, for purposes of these regulations, as if it were located within the jurisdiction of each of the school committees which are members of such collaborative.

201.2 (b) Notwithstanding the definition of "public school facility" in these regulations, a facility operated pursuant to an agreement establishing a regional collaborative shall be considered to be a public school facility only if eighty percent or more of the children educated therein are children without special needs.

201.3 Each school committee which desires to choose the option described in paragraph 201.1 (c) shall submit in writing to the Regional Branch Office of the Division the agreement or contract entered into and a plan for the implementation of the same. The Regional Branch Office shall communicate to the School Committee its approval, or rejection of the contract or agreement. No such agreement or contract shall take effect until approved by such Regional Branch Office and, if one of the parties involved is a public agency or department of the Commonwealth, by the central office of such agency or department.

201.4 Other provisions of these regulations which relate to the manner in which school committees meet their obligations through the options described in paragraphs 201.1 (a) through 201.1 (c) shall be considered as additional to the requirements of paragraphs 201.2 and 201.3.

4. DEPARTMENT OF EDUCATION DRAFT OF PROPOSED REGULATIONS FOR THE IMPLEMENTATION OF CHAPTER 797 OF THE ACTS OF 1974 (second and latest draft of guidelines, dated December 20, 1974)

Preamble

The purpose of Chapter 797 is to encourage the establishment of interdistrict collaborative educational programs and services among the cities, towns and regional school districts of the Commonwealth. The legislation amends Chapter 40, Section 4E of the General Laws and, for the first time in the history of the Commonwealth, permits State financial support for certain interdistrict collaborative programs and services approved in advance by the Commissioner of Education.

The legislation retains local school committee initiative and is specifically aimed towards assisting school districts in providing costly educational programs and services for a limited number of students. Any cost-savings realized at the local school district levels should produce a more cost-effective expenditure of State reimbursement monies.

This act is designed to develop and solidify strong relationships between the Department of Education and local educational agencies. Staff members assigned to the regional education centers will play a leadership role in assisting local school districts relative to the establishment, implementation and evaluation of collaborative educational programs and services.

All collaborative agreements which conform to the provisions of Chapter 40, Section 4E of the General Laws, as amended by Chapter 753 of the Acts of 1972, shall have an effective date prior to November 11, 1974 in order to be approved by the Commissioner of Education. All such educational collaboratives established and authorized under Chapter 753 may legally continue to exist and seek payments from member towns. However, these existing collaboratives shall take action to amend their structures so that they conform with the new requirements of Chapter 797.

All collaborative agreements which have an effective date subsequent to November 10, 1974 shall conform to the provisions of Chapter 797 of the Acts of 1974 in order to be valid.

Section I – Definitions

a. "Regional Offices" – The Regional Education Centers of the Department of Education.
b. "Collaborative Agreement" – an agreement between two or more school committees to provide jointly educational programs and/or services.
c. "Educational Collaborative Board" – the group of individuals who have jurisdiction and authority relative to the operation and control of a collaborative educational program and/or service.
d. "Educational Collaborative Fund" – the depository for all monies appropriated or granted in support of the collaborative educational program and/or service.

Section II – The Collaborative Agreement

The collaborative agreement must be signed by an authorized representative of each school committee which enters into the agreement and by the Commissioner of Education or his designee. The agreement must contain the following provisions:

1. The names of the school districts involved.
2. The kinds of programs and/or services to be initially provided.
3. The approximate amounts of money or kinds of services to be contributed by each participating school district.
4. The target population of individuals who will be served by the collaborative programs and/or services.
5. The cost-effectiveness aspects of the collaborative program and/or service.
6. The effective dates of the collaborative programs and/or services.
7. The terms under which a school district may withdraw from the collaborative program and/or service.
8. The terms under which supplies and equipment will be distributed among member districts at termination of a specific program or service.
9. The terms under which a school district may be admitted as a new party to the collaborative agreement.
10. Any other matters not incompatible with law which the participating school committees deem advisable.

Section III – The Educational Collaborative Board

Each school committee which enters into a collaborative agreement shall appoint one of its members who could delegate his authority to a second party, with the approval of the respective school committee as a whole, to serve on the educational collaborative board. The department of education shall be represented on each educational collaborative board by the appropriate coordinator of a regional education center or his designee.

The educational collaborative board shall exercise jurisdiction and control over the planning, operation, maintenance and evaluation of the collaborative programs and/or services. It shall have the authority to select its own executive officer, to adopt an appropriate name for the purposes of identification, to establish its own set of by-laws and determine its own administrative structure.

Each educational collaborative board shall establish and manage an educational collaborative trust fund. It shall be the duty of the collaborative board to assign the trust fund an appropriate name and to ensure that all support monies are properly deposited in the trust fund.

Section IV – The Educational Collaborative Fund

An educational collaborative trust fund shall be established and appropriately designated by each educational collaborative board. All monies contributed by member municipalities, and all grants or gifts from any source whatsoever shall be deposited in the trust fund. The funds so deposited shall be managed by the members of the educational collaborative board.

Section V – Collaborative Treasurer

The treasurer of the member city, town, or regional school district which has the largest population according to the most recent federal census shall normally serve as the treasurer of the educational collaborative board on a voluntary basis. However, with the permission of this treasurer and the approval of the collaborative board, the treasurer of any other member city, town or regional school district may properly serve as the treasurer of the educational collaborative board without compensation. It shall be the duty of the treasurer to receive and disburse all monies of the educational collaborative trust fund in a proper manner.

Section VI – Procedures for Requesting Approval of Collaborative Agreements and Funding of Collaborative Programs and/or Services

At least five copies of the proposed collaborative agreement with authorized signatures shall be submitted to the coordinator of the appropriate regional education center. Upon review, the coordinator shall attach his written recommendations for further action and forward four copies of the agreement with attachments to the director of the Bureau of School District Reorganization and Collaboration (BSDRC). The director of BSDRC shall coordinate the review of the proposed collaborative agreement among the internal central offices of the department of education and forward the proposed agreement with a written recommendation for action to the commissioner of education.

5. EDCO RECOMMENDATIONS FOR CHAPTER 797 REGULATIONS

COLLABORATIVE BOARD AND ORGANIZATION

Recommendation: *That each school committee entering into such an agreement shall appoint one person from its own membership, or a designee, to form a board to be known as an educational collaborative board.*

This interpretation avoids a potential disruption of the organization and operations of existing collaboratives, particularly in the event that superintendents, special education directors, or directors of pupil personnel services are serving on collaborative boards. (See House No. 2265.)

Recommendations: *That the Department of Education shall be represented on each such board by the appropriate coordinator of a regional education center, or his designee.*

That the Department of Education representative act in a non-voting, advisory capacity on the collaborative board.

The cooperation and coordination of local collaboratives with the efforts of the regional centers is a most important relationship. In order to avoid possible conflicts of interest, since the regional centers may also serve as funding conduits, it is recommended that the regional center representative function in an advisory capacity.

Recommendation: *That membership of the collaborative board not be restricted by the mandates of Chapter 797.*

Chapter 797 mandates that certain individuals sit on the collaborative board. It is recommended that other persons including superintendents, special education directors, and parents also be eligible for membership on this board.

Recommendation: *That Chapter 797 approved collaboratives not be required to receive annual approval by the Department of Education.*

It is recommended that collaboratives must re-apply for state approval only when collaborative membership and/or program purposes have changed.

Recommendation: *That Chapter 753 approved collaboratives be "grandfathered" under Chapter 797, until January 1, 1979.*

This measure is intended to allow long-term, ongoing collaborative programs to continue to operate, without disruption, as presently organized. This four year period will permit an orderly transition of a 753 collaborative to a 797 collaborative. (See House No. 2264.)

COLLABORATIVE FUND AND FINANCING

Recommendation: *That the treasurer of the largest member city or town, or the treasurer of that member community or regional school district approved by the board, shall serve as treasurer of such collaborative board without compensation.*

This recommendation is intended to provide the collaborative board with the flexibility to choose its fiscal agent. In some cases, multi-service collaboratives (those sponsoring many programs) need more than one fiscal agent to handle the various project budgets, since grants must oftentimes be administered through a certain LEA. This approach allows the collaborative board to distribute the administrative burden more equitably across districts. (See Commissioner Anrig's memo and House No. 2265.)

Recommendations: *That funds be allocated annually to support Chapter 797.*

That Chapter 797 grants not reduce Chapter 70 reimbursements.

Chapter 797 grants should be used to encourage collaboration among school districts across the state. This purpose will not be served if the amount of the Chapter 797 grant is later deducted from Chapter 70 reimbursements of the participating communities.

Recommendation: *That legislation be approved to permit school committees to prepay tuition to a collaborative program.*

The reimbursement method oftentimes prevents collaboratives from sponsoring needed programs. If "up-front" monies were provided by participating LEA's through tuition payments, the financing of collaborative programs would be less of a problem. (See Senate No. 411.)

Recommendation: *That existing collaboratives be eligible for Chapter 797 grants to support new programs.*

Existing collaboratives should be eligible for Chapter 797 grant monies to start new programs and projects. This is an important method by which the Department of Education can encourage successful collaborative approaches.

COLLABORATIVE PERSONNEL

Recommendations: *That collaborative personnel be eligible to make direct payments to the state retirement system.*

That collaborative personnel be eligible for health benefits through the Department of Education plan.

That collaborative personnel receive regular fringe benefits from fiscal agent community, i.e., vacation time, sick leave, travel, etc.

That tenure be granted to collaborative personnel at the pleasure of the board.

There are presently some LEA's which do not choose to provide fringe benefits nor do they wish to do so. For quality staff and continuity of program, it seems appropriate that collaborative staff should have similar opportunities as regular staff to obtain fringe benefits.

MASSACHUSETTS DEPARTMENT OF EDUCATION

Recommendation: *That the Department of Education develop additional staff in all regional offices to provide technical assistance to established and new collaboratives.*

The formation of a 797 collaborative will be enhanced if it is known that specific assistance is available to support its development.

LINKAGE ARRANGEMENTS

Recommendation: *That the Secretaries of Education and Human Services issue a definitive paper. The implications of Chapter 766 and Chapter 797 have resulted in changing roles, responsibilities, and procedures in various state agencies. For this reason, the document should clarify in precise terms the support services which are now presently available. Dissemination to school districts throughout the state will enable their collaboratives to make judicious use of the state resources for cost-effective delivery of services required by Chapter 766.*

appendix B: case studies

In Chapter 1, a variety of collaborative relationships are described in a theoretical way. This appendix is designed to give concrete definition to those descriptions through brief abstracts of representative relationships. Each abstract describes the need out of which the group developed, the organization's general purpose and programs, their management structure and fiscal operation.

In addition to the case studies herein, some collaboratives have issued their own descriptive material. An example of this is *Case Study of the Merrimac Education Center,* written by Dr. Ronald G. and Mary C. Havelock, 1974, available from MEC.

1. An Informal Collaborative

Pittsfield Collaborative
Central Annex
2nd Street
Pittsfield, Massachusetts 01201
(413) 499-1234
Howard Eberwein, Director Special Education
Service Area: Berkshire County

In the Pittsfield area, a unique informal collaborative grew out of the need to service children whose primary disability is autism. The collaborative program was developed in 1970 in coordination with the director of a local private school for girls, Miss Hall's School. This informal collaborative illustrates an effective linkage arrangement with a local educational resource. The program is housed at Miss Hall's School, and students from the school serve as tutors in the special education program.

The two special education teachers and a teacher's aide who operate the program are on the Pittsfield staff. The board of directors consists of the director of Miss Hall's and the superintendent and special education director from Pittsfield. The collaborative is a loosely defined organization and the program is open to all students residing in Berkshire County. The collaborative presently services 14 students from Pittsfield, Lee, Williamstown, Cheshire and Sheffield. A standard tuition rate has been set for students not residing in Pittsfield.

2. Chapter 797 Special Education Collaborative in the Process of Organizing

The Shore Collaborative
Main Street
Winthrop, Massachusetts 02152
846-5500
Dr. Dorothy Bennett, Acting Chairperson
Service Area: Chelsea, Everett, Malden, Medford, Revere, Saugus, Winthrop

The Shore Collaborative was initially organized not only because of the need to cooperate and coordinate the development programs and services for special needs students, but also to attract additional federal and state funding for these projects. It is one of the first collaboratives to organize following the passage of Chapter 797 and hopes to be eligible for Chapter 797 funding if and when an appropriation is made.

The collaborative concept was first discussed among several special education directors. The first meeting involved special education directors of Chelsea, Everett, Revere, Saugus and Winthrop.

As a result of this meeting, a collaborative proposal for Title VI funding was developed and submitted. When and if it was accepted, the collaborative planned to hire a core staff and to formalize a contractual agreement.

At about the time the proposal was submitted, Robert Kurtz, of Human Services for the North Shore, Inc., met with some of the directors and offered technical assistance in formalizing the collaborative, organizing a needs assessment, and doing some preliminary program development. Because of the availability of this assistance, it was agreed to proceed regardless of the proposal's outcome.

The next meeting, chaired by Peter Finn, Assistant Superintendent, Winthrop, was attended by the five special education directors and Mr. Kurtz. The agenda of the meeting included membership considerations, drafting an agreement, and establishing a work schedule for the collaborative. It was agreed that Medford and Malden would be invited to join in order to broaden the membership base and to minimize the overlap between The Shore Collaborative and The Tri-City Collaborative (Everett, Malden and Medford). After reviewing Chapter 797 for collaborative agreement regulations, another meeting was planned to which all superintendents would be invited. Special education directors agreed to brief their superintendents beforehand so that they would be prepared to discuss and ratify a collaborative agreement that could be recommended to each school committee with a request for a fiscal year 1976 appropriation of $5,000.

The meeting was highly successful, largely because of the groundwork that had been laid by the special education directors. Each superintendent approved the draft agreement and a FY 76 budget of approximately $30,000 for administrative costs. Further, they expressed a desire to proceed with a formal needs assessment and a plan for program development. All agreed to go to their school committees for approval prior to February 1, 1975.

Plans are currently underway to develop three or four programs before the end of the school year. Areas under study include a thorough needs assessment and the definition of an improved tuition exchange program, a plan for an alternative school project with a major focus on occupational education that could begin immediately (with federal and local funding), and a cooperative effort to perform core evaluations for members' currently institutionalized students.

3. A Chapter 753 Single Program Special Education Collaborative

READS (Regional Educational Assessment and Diagnostic Services)
Lakeville Hospital
Lakeville, Massachusetts 02346
947-3634
Robert Hartman, Director
Service Area: Abington, Berkley, Bridgewater,
Bridgewater-Raynham Regional High School, Bristol,
Bristol-Plymouth Regional Technical School, Dighton,
Dighton-Rehoboth Regional High School, East Bridgewater,
Freetown, Freetown-Lakeville Regional High School,
Hanson, Holbrook, Lakeville, Middleboro, Raynham,
Rehoboth, Taunton, Wareham, West Bridgewater, Whitman,
Whitman-Hanson Regional High School

The READS Collaborative was formed in 1972 to provide diagnostic services to special needs students of school systems in the Southeast Region. The LEA's involved in this collaborative arrangement are located within a 20-mile radius of Lakeville, Massachusetts, the collaborative's base.

The collaborative is governed by a board of directors comprised of a school committee representative or superintendent from each member community. The directors of pupil services or special education administrators from the member systems serve as the steering or middle management committee. The staff is administered by an executive director and includes one teacher, two teacher's aides, one pediatrician and one secretary. Special consultants are contracted as necessary.

Although no formal needs assessment was conducted, the collaborative grew out of the need for cost-effective diagnostic services for the local communities and the feeling that these services could best be provided through a sharing of costs and resources in a central location.

Each town contributed an initial membership fee (based on their total school population) of $2 per pupil. This fee guarantees that the collaborative will perform a predetermined number of diagnostic evaluations for the town. Additional evaluations are charged to member communities.

The collaborative functions within the guidelines of Chapter 753. All decisions on expansion, new memberships, or services extended to non-members require a majority decision of the board.

4. A Chapter 753 Special Education Collaborative with Multiple Services

SPEDCON (North Shore Special Education Consortium, Inc.)
162 Federal Street
Salem, Massachusetts 01970
745-8700
Kevin O'Grady, Director
Service Area: Beverly, Boxford, Danvers, Marblehead,
Masconomet Regional District, Middleton, Peabody, Salem,
Swampscott, Topsfield

SPEDCON, The North Shore Special Education Consortium, Inc., formed in May 1974, was organized to provide improved services for children with special needs residing in the member communities and has been approved under Chapter 753 regulations. At present, this collaborative has a variety of programs including a minischool and an itinerant teachers program for hearing impaired, visually impaired and physically handicapped students. In addition, the collaborative has developed two programs for the developmentally disabled, one aimed at primary students and the other concentrating on career education for older students.

A full time director and administrative assistant coordinate the various programs and provide the overall direction to the consortium, working closely with a board of directors that consists of the pupil service and special education directors of the member communities and one liaison superintendent. All procedures and policies are decided upon by the board. The director, who is selected and appointed by the board, is responsible to the board for the activities and functioning of the consortium.

SPEDCON receives its funding from a variety of sources: membership fees, federal and state grants, and contracts from the Department of Education. It has received additional monies from non-member communities who purchase specific services. Expenses relating to personnel hired for program implementation are shared by the member schools.

In its one year of operation, services provided to its members by the consortium have proved to be cost-effective and have made available programs that would have been impossible for individual communities to support on their own.

5. A Chapter 753 Special Education Collaborative with Multiple Services

Blackstone Valley Special Needs Collaborative
P.O. Box 176
Upton, Massachusetts 01568
529-3028
Thomas P. McMurray, Director
Service Area: Blackstone-Millville Regional, Grafton,
Hopedale, Mendon-Upton Regional, Milford, Northbridge, Uxbridge

The Blackstone Valley Special Needs Collaborative began operations in August 1974 to coordinate services for special needs students in that region. Many school districts were contacted and invited to participate in the planning process, out of which the present seven members ultimately joined forces. The collaborative is approved under Chapter 753 and its board consists of the seven superintendents of the member districts, each having one vote. The Mendon-Upton Regional School District serves as fiscal agent for the collaborative.

The collaborative's efforts this fall centered around developing a cost-effective transportation system for the special needs students of the nine communities. To date, the collaborative has been successful in reducing transportation costs.

Another activity of the Blackstone Valley Special Needs Collaborative, and one that will become increasingly important, is the coordination of special education programs in the member districts. At this point, all special education programs are sponsored at the local level, while the collaborative aids in placing and transporting students. The collaborative hopes to increase services by hiring additional staff and sponsoring programs for its member districts next year.

The Blackstone Valley Special Needs Collaborative was funded entirely by its member communities for this first year of operations. A flat membership rate ($4,000) was agreed upon by the seven school districts. Funding is being sought from a variety of sources for next year, including Title VI, Office for Children, and Chapter 797.

6. A Chapter 753 Multi-purpose Collaborative

Hampshire Educational Collaborative
Trustee Home
Hopkins Academy
Hadley, Massachusetts 01035
(413) 586-4590
Peter Demers, Director
Service Area: Amherst, Amherst-Pelham Regional,
Belchertown, Easthampton, Gateway Regional, Granby,
Hadley, Hampshire Regional, Hatfield, Northampton, Pelham,
South Hadley, Union 66

The Hampshire Educational Collaborative was approved under Chapter 753 in February 1974 and began operation in July 1974. Designed as a multi-purpose organization, it has two major focuses – occupation education for high school students and programs and services for special needs youngsters identified by Chapter 766. Originally funded by a Title III Occupational Competency grant, this organization has embarked on a number of different programs to best meet the needs of the district it serves. Below are brief program descriptions of on-going or soon-to-be operating programs.

1. Developmental Day Care Program designed to serve 17 severely multiply-handicapped youngsters from the ages of 7-21.
2. De-Institutionalization Project – Core Evaluations are being conducted and educational programs developed for approximately 30 currently institutionalized youngsters.
3. Core Evaluation Assessment and Consultation – HEC operates a mobile diagnostic unit staffed by a school psychologist, a social worker and a secretary. This van provides a variety of direct and consultative services ranging from pre-school screening to actual CET's and home visits. This project is funded by Title VI-B.
4. Itinerant Teacher Program – The HEC provides itinerant teacher service on an as needed basis to certain collaborative school districts.
5. Pre-Sheltered Workshop Vocational Program – This program services 13 special needs youngsters to prepare them for sheltered workshop or other low-skill-level occupation training.
6. Pre-Vocational Program – This program is designed to assist special needs youngsters to make the transition from the academic classroom to a regular occupational education program with a minimum of adjustment difficulties.
7. Occupational Program for Emotionally Disturbed Students – Offers occupational and career education to high school students who are unable to function successfully in traditional settings. It is based at and run cooperatively with Hampshire College.
8. Westover Occupational Resource Center (W.O.R.C.) – Through a grant from the Office of Manpower Affairs, HEC administers a planning project in collaboration with the Holyoke and Chicopee Public Schools to develop a senior high school, post-secondary and adult skills training center in 11 federally surplused buildings at Westover Air Force Base.

9. Occupational Competence Project – The development of a pilot program in occupational education is the first step taken toward the development of a total occupational competence/occupational education delivery system for the students of the Hampshire Educational Collaborative area. As a demonstration of the commitment of the communities to the concept of cooperation, most of the districts have allotted a number of occupational education slots to be used for students from other districts. This pilot effort involves the utilization of in-school resources. The second part of this effort will take place next year with a program utilizing out-of-school resources.

7. A Chapter 753 Multi-purpose Collaborative

EdCo (Education Collaborative for Greater Boston, Inc.)
186 Hampshire Street
Cambridge, Massachusetts 02139
868-2100
Medill Bair, Director
Service Area: Bedford, Boston, Brookline, Cambridge, Lexington, Lincoln, Lincoln-Sudbury Regional, Medford, Newton, Sudbury, Waltham, Watertown

The Education Collaborative for Greater Boston was organized in 1969 by the superintendents of seven school districts. Since that time, two of the original communities have decided not to continue participation and seven additional districts have joined. Presently the collaborative represents some 265,000 metropolitan students.

EdCo operates under Chapter 753 approval. Its board of directors consists of the superintendent and one school committee representative from each member district. Membership is by formal agreement, although there are some informal arrangements for specific services to non-EdCo communities. Sources of funding are derived from membership fees (based on enrollments), contractual arrangements, federal or state grants, and private foundations. The board votes on all policy matters but the responsibility for management and operation of programs and services is assigned by the board to a director.

EdCo was organized to find better solutions to common problems of metropolitan interest and continues to develop programs in a cost-effective manner when requested by any two or more of its members. The four main components of the collaborative are the Reading and Learning Center (tutors, aides, resources); the SPACE Program (occupational education in an industrial setting) and a related work-study operation with ten classes located in Boston, New Bedford and Worcester; a Metropolitan Education Center; and a Special Education Division. Each project or division has such professional staff and support personnel as needed to accomplish its objectives.

Nine advisory groups representing different roles and functions are organized with representatives from each member district and meet periodically to foster communication and ideas across district lines and to identify common problems that might be solved by collaborative action.

appendix C: collaboratively run programs to serve special needs students in massachusetts

Note: The information in this appendix has been compiled throughout the term of the study, but it is continually subject to change. For specific needs, one should contact the person so listed. An additional resource that may prove useful is the List of Special Needs Collaboratives, *document No. 8188, 1975, available from the Division of Special Education.*

The following chart summarizes where special education collaborative programs are operating. The numbers refer to the regional/alphabetical listing that follows in this appendix.

Autistic	3, 13, 17, 55, 69
Career/Occupational	6, 10, 13, 27, 29, 35, 48, 50, 61, 64, 67
Developmentally Disabled	1, 2, 10, 14, 16, 18, 27, 29, 31, 35, 38, 39, 41, 45, 55, 61, 64
Diagnostic Services	38, 41, 52, 54, 61, 62
Emotionally Disturbed	4, 13, 14, 18, 26, 29, 30, 41
General SPED Programs	2, 6, 11, 18, 21, 24, 27, 28, 29, 32, 40, 47, 50, 51, 52, 56, 57, 58, 59, 60, 67, 68
Hearing Impaired	9, 28, 29, 37, 49, 65
Language Impaired	9, 18, 30, 41
Pre-School	4, 6, 9, 11, 27, 38, 55
Residence Program	9, 70
Visually Impaired	5, 7, 8, 15, 19, 23, 27, 29, 32, 34, 36, 42, 43, 63

GREATER BOSTON REGION

Greater Boston Regional
Education Center
Contact: Sam Bolognese
54 Rindge Avenue Extension
Cambridge, Massachusetts 02140
547-7472

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
1. Arlington, Bedford, Lexington Kevin Foley (272-3430)		x				x												
2. Arlington, Belmont, Watertown Robert Collier (484-3160) Raymond Bohn (646-1000) Grace Kaczynski, G.L. Kupperschmidt (924-1362)		x				x			x									
3. Arlington, Burlington, Lexington Raymond Bohn (646-1000)		x	x															
4. BEAVERBROOK THERAPEUTIC KINDERGARTEN Belmont, Waltham, Watertown, DMH Referrals Jane Hollenback, Director (489-5240)		x						x						x				
5. Cambridge, Watertown G.L. Kupperschmidt (924-1362)		x																x
6. CHARMSS Avon, Canton, Holbrook, Milton, Randolph, Sharon, Stoughton Fred Hire, Director (963-7800, Ext. 67)		x		x	x				x					x			x	
7. Chelsea, Everett, Revere, Winthrop Daniel Driscoll (289-9200, Ext. 114)		x									x							x
8. Dedham, Norwood, Westwood Jennifer Goodwin (326-1460)		x									x							x

GREATER BOSTON REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
9. EDCO (The Education Collaborative for Greater Boston, Inc.) Bedford, Boston, Brookline, Cambridge, Lexington, Lincoln, Lincoln-Sudbury Regional, Medford, Newton, Sudbury, Waltham, Watertown Medill Bair, Director (868-2100)	x				x					x		x		x	x			
10. LAB, PRE-VOCATIONAL LIFE CARE TRAINING CENTER Arlington, Bedford, Lexington Marsha Flowers (861-9580) Lars Guldager (862-7500, Ext. 240)		x		x		x												
11. PRE-SCHOOL SPECIAL NEEDS PROGRAM Brookline, Newton Marion Hainsworth (332-8062)		x							x					x				
12. THE SHORE COLLABORATIVE Chelsea, Everett, Malden, Medford, Revere, Saugus, Winthrop Dorothy Bennett (846-5500)		x											x					
13. TEC (The Education Cooperative) Dedham, Natick, Needham, Norwood, Walpole, Wayland, Wellesley, Weston, Westwood Roger Ritch, Director (653-4300, 237-3028)	x		x	x	x			x	x							x		
14. TRI-CITY COLLABORATIVE Everett, Malden, Medford Nancy White (396-5800, Ext. 222, 203)		x				x		x										

NORTHEAST REGION

Northeast Regional
Education Center
Contacts: William Ferris,
Mary Ann McKeon, Michelle
Ciocca, Frank Bianco, Joan Conlon
1551 Osgood Street
North Andover,
Massachusetts 01845
687-3351

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
15. Billerica, Carlisle, Chelmsford Bob Zolo (667-2142)		x									x							x
16. Billerica, Chelmsford Bob Zolo (667-2142)		x				x												
17. CAPE ANN COLLABORATIVE Essex, Hamilton, Ipswich, Manchester, Rockport, Wenham James O'Connell, Director (546-6277)													x					
18. CASE (Concord Area Special Education Collaborative) Acton, Acton-Boxborough Regional, Bedford, Boxborough, Concord, Concord-Carlisle Regional, Carlisle, Harvard, Lincoln, Lincoln-Sudbury Regional, Littleton, Maynard, Nashoba Regional, Stow Gerry Mazor, Director (369-9500, Ext. 285)		x			x	x		x	x			x				x	x	
19. Chelmsford, Dunstable (251-4961)		x									x							x
20. Georgetown, Newburyport, Triton Regional, Whittier Vocational School George Korn (372-6762)		x											x					
21. GREATER LAWRENCE COLLABORATIVE FOR SPECIAL NEEDS Andover, Lawrence, Methuen, North Andover David P. Sampson (686-0194)		x							x									
22. GREATER NEWBURYPORT COLLABORATIVE Georgetown, Newbury, Newburyport, Rowley, Salisbury Mr. Mahon (465-5322)													x					

NORTHEAST REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
23. Lincoln, Marlborough, Sudbury Mr. Ellery (443-9971)		x									x							x
24. Lynn, Nahant, Saugus Mr. Barrasso (593-1680)		x							x									
25. MEC (Merrimac Education Center) Andover, Ashby, Bedford, Billerica, Carlisle, Chelmsford, Dunstable, Groton, Lawrence, Littleton, Lunenburg, Methuen, North Andover, Pepperell, Tewksbury, Townsend, Tyngsboro, Westford, Wilmington Richard Lavin, Director (256-3985)	x				x											x		
26. MERRIMAC COMMUNITY SCHOOL Billerica, Chelmsford, Dracut, Tewksbury, Westford Nancy Araneo (851-4711)		x						x										
27. SEEM (Special Education of Education Mutual) Lynnfield, North Reading, Reading, Stoneham, Wilmington, Winchester, Woburn Carl Toth, Director (664-2961, 664-2336)		x	x	x	x	x			x		x			x		x	x	x
28. SNEC (Special Needs Educational Collaborative) Ayer-Shirley, Dunstable-Groton, Lunenburg, North Middlesex Regional, Tyngsboro Costa Leodas, Director (425-9383)		x			x				x	x			x			x		

NORTHEAST REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
29. SPEDCON (North Shore Special Education Consortium) Beverly, Boxford, Danvers, Marblehead, Masconomet Regional, Middleton, Peabody, Salem, Swampscott, Topsfield Kevin O'Grady, Director (745-8700)		x		x	x	x		x	x	x	x						x	x

WORCESTER REGION

Worcester Regional Education Center
Contact: Paul Teto
271 West Boylston Street
West Boylston, Massachusetts
01583
835-6267

30. Barre, Hardwick, Hubbardston, Oakham John Kozlowski (355-2055)		x						x			x	x						
31. Berlin, Boylston Mr. O'Donnell (869-2406)		x				x					x							
32. BLACKSTONE VALLEY SPECIAL EDUCATION COLLABORATIVE Blackstone-Millville Regional, Grafton, Hopedale, Mendon-Upton Regional, Milford, Northbridge, Uxbridge Thomas McMurry, Director (529-3028)		x			x				x		x						x	x
33. CAPS (Collaborative Assessment and Program Systems) Ashburnham, Athol, Gardner, Orange, Petersham, Templeton, Westminster, Winchendon Charles Bird (632-1602)													x					
34. COLLABORATIVE FOR VISUALLY HANDICAPPED CHILDREN Shrewsbury, West Boylston Paul Kroll (835-4702)		x									x							x

WORCESTER REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
35. DOWNING PLACE SCHOOL Brimfield, Oxford, Southbridge, Sturbridge, Webster Pam Griffin (943-0280)		x		x		x												
36. Fitchburg, Leominster, Townsend, Westminster Don Tagney (345-7541)		x									x							x
37. LEOMINSTER DAY CLASSES FOR DEAF Ayer, Clinton, Fitchburg, Gardner, Groton, Lancaster, Leominster, Lunenburg, Pepperell, Shirley, Townsend, Westminster Richard Cocci (537-9250)		x								x								
38. PROJECT ACCEPT Ashland, Dover, Framingham, Holliston, Hopkinton, Medfield, Medway, Millis, Natick, Sherborn, Sudbury Charles Gunnoe, Director (872-6036)		x			x	x	x							x				
39. REGIONAL DEVELOPMENTAL CENTER Auburn, Barre, Holden, Paxton, Princeton, Rutland, Spencer, Sterling, Wachuset Regional High School, West Boylston Forrest Gilmore (829-3537)		x				x												
40. 766 COLLABORATIVE Berlin-Boylston, Tahanto Regional School District, West Boylston Paul Kroll (835-4702)		x			x				x									

WORCESTER REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
41. TRI VALLEY REGIONAL SPECIAL EDUCATION PROGRAM Ashland, Holliston, Hopkinton, Medfield, Medway, Millis Elmer Haskell (429-6363)		x			x	x	x	x				x					x	

SOUTHEAST REGION

Southeast Regional Education Center
Contacts: Robert Brown, Jack Burke
Lakeville State Hospital
Rte. 105, Lakeville, Ma.
(Mailing Address:
P.O. Box 29
Middleboro, Massachusetts 02346)
947-3240

42. Abington, Brockton, Whitman Joseph Potoczak (871-0444)		x									x							x
43. Braintree, Norwell, Rockland, Weymouth Larry Lambrose (335-1460)		x									x							x
44. CAPE COD COLLABORATIVE Barnstable, Brewster, Bourne, Cape Cod Regional Vocational Technical School, Chatham, Dennis, Dennis-Yarmouth Regional, Eastham, Falmouth, Harwich, Mashpee, Nausset Regional, Orleans, Provincetown, Sandwich, Truro, Wareham, Wellfleet, Yarmouth Paul Hackett (432-4500)													x					
45. CAPE COD LEARNING CENTER Barnstable, Bourne, Dennis, Falmouth, Wareham, Yarmouth Clayton Beless (771-2211)		x				x												

SOUTHEAST REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
46. CAPTA (Collaborative Approach to the Processing of Teacher Applications) Carver, Cohasset, Duxbury, Halifax, Hanover, Hanson, Hingham, Hull, Kingston, Marshfield, Norwell, Pembroke, Plymouth, Plympton, Scituate Weymouth Dan Gibbs (749-2462)																x		
47. CLINICAL TEACHER CENTER Brewster, Eastham, Orleans, Wellfleet Mrs. Barbara Wright (349-6059)		x							x									
48. COOPERATIVE PRODUCTION Berkley, Dever State School, Dighton, Rehoboth, Seekonk, Swansea Russell Latham (252-3702)		x		x														
49. Fall River, New Bedford Richard Burke (997-4511)		x								x								
50. FIVE TOWN COLLABORATIVE Acushnet, Fairhaven, Marion, Mattapoisett, Rochester William Quinlin (997-2971)		x		x					x									
51. LIGHTHOUSE EDUCATIONAL CORPORATION Abington, Carver, Cohasset, Duxbury, Halifax, Hanover, Hanson, Hingham, Hull, Kingston, Marshfield, Norwell, Pembroke, Plymouth, Plympton, Rockland, Scituate, Whitman Dr. Fox (878-0786)		x							x								x	

SOUTHEAST REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
52. PILGRIM AREA COLLABORATIVE Carver, Duxbury, Marshfield, Plymouth, Silverlake Regional School District Fred Hemmila, Director (585-4313)		x					x		x									
53. PROJECT SPOKE Easton, Foxboro, Mansfield, Norton John Stephani, Director (285-7766)	x				x				x							x		
54. READS (Regional Educational Assessment and Diagnostic Services) Abington, Berkley, Bridgewater, Bridgewater-Raynham Regional High School, Bristol, Bristol-Plymouth Regional Technical School, Dighton, Dighton-Rehoboth Regional High School, East Bridgewater, Freetown, Freetown-Lakeville Regional High School, Hanson, Holbrook, Lakeville, Middleboro, Raynham, Rehoboth, Taunton, Wareham, West Bridgewater, Whitman, Whitman-Hanson Regional High School Robert Hartman, Director (947-3634)		x					x											
55. SOUTH SHORE MENTAL HEALTH CENTER Braintree, Cohasset, Hingham, Hull, Milton, Quincy, Scituate, Randolph, Weymouth Barbara Greenglass, Director (471-0350)		x	x			x								x				

SOUTHEAST REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
56. SOUTHEAST REGION SPECIAL NEEDS PROGRAM Abington, Rockland, Whitman Joseph Potoczak (871-0444)		x							x									
57. SPECIAL EDUCATION COOPERATIVE Bridgewater, East Bridgewater, Middleboro, Raynham, West Bridgewater Lincoln Lynch (947-3450)		x							x									
58. TRI-TOWN SPECIAL NEEDS PROGRAM Hanover, Hanson, Norwell Charles O'Donnell (878-0786)		x							x									

SPRINGFIELD REGION

Springfield Regional Education Center
Contacts: Inez Hegarty, Catherine Fitzgerald, Paul Caouette, Scotty Torres, Richard Salus
2083 Roosevelt Avenue
Springfield, Massachusetts 01104
(413) 743-2167

59. Ashfield, Buckland, Charlemont, Colrain, Heath, Plainfield, Shelburne Falls, Rowe Arthur Sylvester (413/625-2555)		x			x				x									
60. Erving, Leverett, New Salem, Shutesbury, Wendell Leonard Lubinski (413/544-3602)		x			x				x									

SPRINGFIELD REGION, cont.

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
61. FRANKLIN COUNTY SUPPLEMENTARY EDUCATION CENTER PROJECT Bernardston, Conway, Deerfield, Erving, Gill, Greenfield, Leverett, Leyden, Montague, New Salem, Northfield, Orange, Shutesbury, Sunderland, Turners Falls, Warwick, Wendell, Whately Nina Ilardi, Director (413/737-4631)		x		x		x	x											
62. HAMPSHIRE EDUCATIONAL COLLABORATIVE Amherst, Amherst-Pelham Regional, Belchertown, Easthampton, Gateway Regional, Granby, Hadley Hampshire Regional, Hatfield, Northampton, Pelham, South Hadley, Union 66 Peter Demers, Director (413/586-4590)	x				x		x		x							x			
63. REGIONAL VISUALLY HANDICAPPED PROGRAM Agawam, Southwick, West Springfield, Westfield James Brueno (413/786-5809)		x									x							x
64. WORK OPPORTUNITY CENTER Open to all towns in the Springfield area Don Snyder, Director (413/737-4631)		x		x		x												

PITTSFIELD REGION

Pittsfield Regional Education Center
Contact: Daniel Burke
188 South Street
Pittsfield, Massachusetts 01201
(413) 499-0745

NAME (where appropriate) SERVICE AREA CONTACT	Multi-purpose Collaborative	Special Education Only	• Autistic	• Career/Occupational	• Coordination	• Developmentally Disabled	• Diagnostic Services	• Emotionally Disturbed	• General SPED Programs	• Hearing Impaired	• Itinerant Teacher	• Language Impaired	• Organizing	• Pre-School	• Residence Program	• Staff Training/Recruitment	• Transportation	• Visually Impaired
65. BERKSHIRE COUNTY COLLABORATIVE FOR DEAF EDUCATION Berkshire County Carol Ann Smith (413/443-0076)		x								x								
66. Berkshire County LEA's and North Adams State Teachers College George Cross (413/664-4511, Ext. 291)		x														x		
67. CENTRAL BERKSHIRE REGIONAL VOCATIONAL COLLABORATIVE FOR CHILDREN WITH SPECIAL NEEDS Dalton, Great Barrington, Hancock, Lanesboro, Lenox, Pittsfield, Richmond Howard Eberwein (413/499-1234)		x		x					x									
68. NORTH BERKSHIRE UNION SPECIAL EDUCATION COLLABORATIVE Clarksburg, Florida, Monroe, North Adams, Savoy Joe Joseph (413/664-9292)		x			x				x									
69. PITTSFIELD COLLABORATIVE Berkshire County Howard Eberwein (413/499-1234)		x	x															
70. SOUTH BERKSHIRE EXCHANGE PROGRAM Alford, Avalon School (in North Adams), Egremont, Monterey, Mt. Washington, New Marlboro, Sheffield Mr. Segal, Tom Consolati (413/229-8778)		x													x			

mace

Invitation to Comment

The Massachusetts Advisory Council on Education invites your comments on this report. The form to the right of this invitation may be clipped and used to record your comments. Attach additional sheets if necessary. Mail your comments to:

Director of Research
Mass. Advisory Council on Education
182 Tremont Street
13th Floor
Boston, MA 02111

//

Thank you.

COMMENTS ON THIS MACE REPORT
(Use additional sheets if necessary.)

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ADDRESS _____

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current MACE publications

1975

Financing Public Education in Massachusetts: A Process for Revision, *John E. Heffley*

1974

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*Financing Public Schools in Massachusetts: Problems of the Past, the Present and the Future (Proceedings: 1974 Invitational Conference Board), *Massachusetts Educational Conference Board/New England School Development Council*

Massachusetts Taxes: A Factual Guide to Future Action, *Massachusetts Taxpayers Foundation*

*Organizing for Improving Delivery of Educational Services in Massachusetts, Volumes I & II, *Richard Lavin*

A Plan for Advancing Quality and Excellence by the Organization and Management of Public Education, *Governor's Commission on School District Organization and Collaboration*

1973

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1972

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1971

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The People's Colleges: The State Colleges of Massachusetts, *Evan R. Collins et al.*

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The State Dollar and the Schools: A Discussion of State Aid Programs in Massachusetts and Promising Reforms, *Charlotte Ryan*

1969

*Take A Giant Step: Evaluation of Selected Aspects of Project 750, *Herbert Hoffman*

*The content of these studies is directly applicable to the development of special education collaboratives.